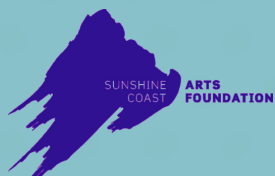




Sunshine Coast Audience and Market Research

Final report



October 2020

Acknowledgements

This report was prepared for Sunshine Coast Arts Foundation and Sunshine Coast Council by research agency Patternmakers.

The authors would like to acknowledge the individuals involved in this research project, including staff at Sunshine Coast Council and Sunshine Coast Arts Foundation, stakeholders and all those participating in the research.

The Sunshine Coast Council, Sunshine Coast Arts Foundation and Patternmakers acknowledge the Kabi Kabi and Jinibara Peoples as the traditional custodians of the Sunshine Coast and wish to pay respect to their Elders past, present and emerging.

Patternmakers also acknowledges the Gadigal people of the Eora Nation, the traditional custodians of Sydney, where Patternmakers is based, and wishes to pay respect to their Elders past, present and emerging.

About the Sunshine Coast Arts Foundation

The Sunshine Coast Arts Foundation (SCAF) promotes the development and prosperity of the arts on the Sunshine Coast.

It was established by the Sunshine Coast Arts Advisory Board, which has developed the Sunshine Coast Arts Plan 2018-2038, the blueprint for support for the arts. The Sunshine Coast Council has provided three-year funding and office support for SCAF, after which time the Foundation is to be self-funding.

About Patternmakers

Patternmakers is a research agency specialising in culture, creativity, and community. We believe in the power of insight to help the arts flourish in Australia.

For any questions, please contact Tandi Palmer Williams, Managing Director on tandi@thepatternmakers.com.au.



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Executive Summary

Background

SCAF and the Sunshine Coast Council commissioned new research to understand and develop audiences in the region

In 2020, the Sunshine Coast Arts Foundation (SCAF) and the Sunshine Coast Council worked with Patternmakers to carry out market and audience development research to support the Sunshine Coast Arts Plan 2018–2038.

This research aimed to understand key audience segments in the Sunshine Coast region, identify ways to deepen engagement and highlight opportunities for new arts and cultural experiences in 2020 and beyond.

This report explores the findings from data collected from over 600 participants through depth interviews, focus groups, and an online survey of audience databases of venues and events based in the Sunshine Coast region. More information about the research method is included in the Methodology section of this report.

Key findings

9 in 10 people agree that arts and culture make the Sunshine Coast a better place

Respondents to the online survey were asked a series of questions about their interests and the value of arts and culture in their personal lives.

The majority of respondents generally agreed with numerous positive statements about arts and culture, including that children should be exposed to a variety of cultural experiences (93%), and that arts makes for a more meaningful life (88%).

When asked about the role of arts and culture on the Sunshine Coast, 9 in 10 agreed that arts and culture make the Sunshine Coast a better place to be (89%), and that they enjoy seeing local artists achieve success (92%).

When asked to rate the importance of a series of different activities, most respondents rated engaging in arts and culture as important or very important (61%), alongside socialising with

friends (60%), and slightly lower than spending time with family (79%) and outdoor activities (71%).

Most respondents attend the arts, and many are getting creative themselves

When asked about their participation in key forms of arts and culture, 96% said they attended at least one type of event as an audience member in 2019. The most common types of artforms that people engaged with as an audience member were musical performances (82%), visual arts (71%) and theatre or dance (61%).

A sizeable proportion of respondents creatively participated in arts and culture in 2019 (47%), a trend which is growing fast nationally. This includes activities like making music, creating films, and painting and drawing. Over one-fifth of respondents (22%) earn an income from performing, teaching, or creating art themselves.

In terms of venues and events that were attended in 2019, the largest proportion of respondents attended the Events Centre (54%), Venue 114 (34%) and the Sunshine Coast Regional Gallery (32%).

Pre-COVID-19 pandemic, most people attended Sunshine Coast events occasionally and there is interest to see more on offer

While many people value arts and culture and agree that it should be embedded into everyday life, survey data indicates that attendance at local venues and events (pre-COVID-19 pandemic) in the region is generally 'occasional'. Just over one quarter (27%) of people were attending arts and culture events locally more than once a month.

Feedback from focus group participants aged 18 to 35 reveals that arts experiences on the Sunshine Coast are seen as 'few and far between', and young people perceive a lack of cultural activities to get involved in locally. One said,

'It's hard to [find events] when you know there's nothing happening on your doorstep'.

Other age groups also express a desire to see more events in the region and would prefer to attend locally rather than travel to Brisbane to attend performances and exhibitions.

The Sunshine Coast is still developing its reputation as a 'creative region'

Despite the majority of respondents agreeing that arts and culture make the Sunshine Coast a better place, there are mixed views about whether the Sunshine Coast is known for its creativity. A sizeable proportion of survey respondents feel 'neutral' (24%) or at least somewhat 'disagree' (19%) that the Sunshine Coast is 'known as a creative region'.

In terms of satisfaction, just over half (57%) feel satisfied with arts and culture on the Sunshine Coast, which represents a solid baseline from which to measure improvements and track progress over time. Survey respondents who identified as visitors were more inclined to feel satisfied with arts and culture overall (69%), compared to local residents (56%).

Around two-thirds (62%) of respondents feel satisfied with the quality of experiences on offer, however fewer than half are satisfied with the appeal to all age groups (46%), the range of venues and facilities in the region (49%) and the quantity of events available (48%). Some participants even highlighted the tendency for Sunshine Coast arts and culture to be 'safe' or lacking risk and experimentation.

Awareness of local venues and events varies, and many don't know what's on

While most survey respondents said they were aware of key cultural venues and events in the Sunshine Coast region, such as The Events Centre (81%) and Caloundra Music Festival (80%), commentary in the focus groups suggests that awareness varies in the wider community, particularly of smaller venues and events.

Past attendees of Horizon Festival acclaimed the event for its high-quality programming; however, research participants also highlighted the notable lack of awareness and accessibility of the event in the broader community.

Further, when respondents were invited to recall factors that had prevented them from attending arts and cultural events in 2019, the most highly ranked barrier to attendance was not knowing 'what's on' locally: 83% experienced this at least 'sometimes'.

There is appetite for regular, outdoor, and 'incidental' events

When considering what kinds of events they would like to attend in future, survey respondents were favourable towards events held in outdoor spaces and, on average, this idea was ranked as the most preferred type of event for future participation.

Several research participants explained that outdoor events would make the most of the unique landscape of the Sunshine Coast region, as well as incidental events that can be engaged with on a regular basis. For example, some described ‘stumbling upon’ artwork in public, or watching a local musician play at a nearby park.

While the COVID-19 pandemic has limited opportunities for regular live attendance, the data indicates that audiences have a desire for regular activity, complemented by targeted, niche activities, in future scenarios. Research participants were also more inclined to prioritise ‘lots of small, niche events’, as opposed to ‘fewer, large, accessible events’ for future attendance options.

Priority opportunities

Meaningful audience development relies on a continuation of a coordinated and collaborative approach among stakeholders

The establishment of SCAF and adoption of the Arts Plan represents an excellent foundation for audience development across the region.

The research findings were discussed in a virtual workshop with SCAF, Sunshine Coast Council and representatives from key venues and events across the region.

In terms of strategy and planning, further opportunities identified include:

- ▶ Hosting a group event to share the research findings among the region’s arts and culture stakeholders
- ▶ Updating survey respondents when the results are available, and the actions planned on the back of the research
- ▶ Engage and collaborate with stakeholders on an Audience Development Plan for the region, to set a strategy based on this research and identify shared goals, roles, timelines and resources, and a dashboard to track progress
- ▶ Consulting with stakeholders for advice on access and inclusion, to provide recommendations and guidance for venues and events across the region.

Best practice marketing and communications will maximise opportunities for locals and visitors to enjoy the arts

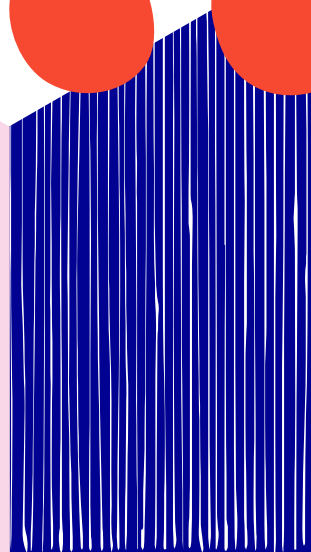
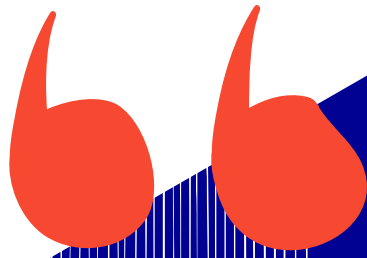
With awareness identified as one of the key barriers to participation, there are a range of opportunities to continue improving marketing and communications related to arts and culture. Important specific opportunities identified in relation to marketing include:

- ▶ Increasing the level of community understanding and awareness of the full range of venues and events locally
- ▶ Supporting ongoing professional development of marketers across the region, particularly in relation to social media and email marketing
- ▶ Exploring the case for best practice marketing guidelines, such as advice on paring back language to avoid intimidating people
- ▶ Enlisting organisations with large databases and large audiences for strategic cross-marketing of taster events and opportunities for participation
- ▶ Launching a 'What's on' website and regular email – to grow awareness and participation across the region.

Strategic programming will help to fill gaps in current provision for outdoor events, music events and regular creative workshops

The research has helped to identify community priorities for future programming. The key opportunities are:

- ▶ Strategically identifying 'gateway' or 'taster' experiences that are important for the region as a whole and can be marketed to a broad audience
- ▶ Increasing programming of regular events – growing opportunities for weekly engagement (e.g. life drawing), offering more commitment where needed
- ▶ Considering ways to activate outdoor public places with arts installations and cultural events as the COVID-19 pandemic passes, such as re-igniting busking locally across the region and regular programming of Sunday Sessions
- ▶ Considering ways to incentivise investment in regular arts event programming by local businesses, artist collectives and entrepreneurs, through grants or concessions on spaces
- ▶ Reviewing the event listings and calendars to identify gaps in relation to audience interests and increasing programming accordingly.



'Whatever it is, it needs to be authentic to the Sunshine Coast... have a story behind it...'

**Sunshine Coast Interviewee
2020**



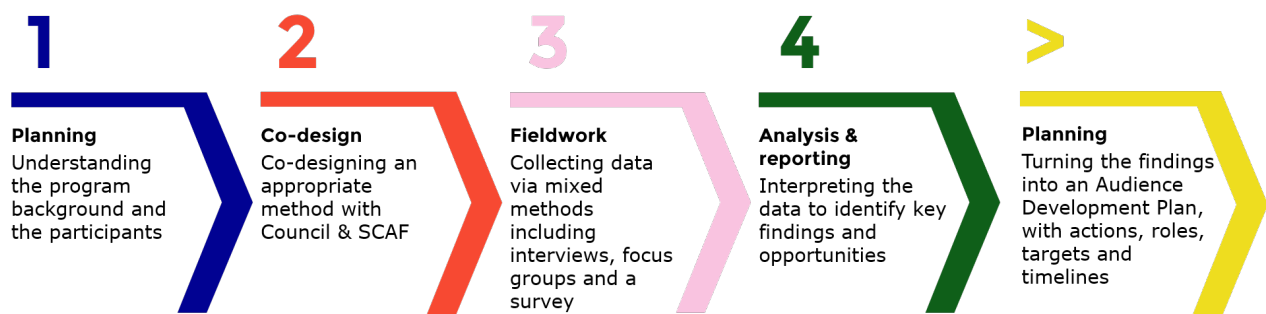
Introduction

Background

Established by the Sunshine Coast Council, the Sunshine Coast Arts Foundation (SCAF) promotes the development and prosperity of the arts on the Sunshine Coast. As stated in the Sunshine Coast Arts Plan 2018-2038, the vision of SCAF, and the Sunshine Coast Council is 'an enlightened and enriched Sunshine Coast region, transformed by philanthropic investment in arts and culture'.

In June 2020, SCAF, in collaboration with the Sunshine Coast Council, commissioned research agency Patternmakers to carry out market and audience development research to support the Sunshine Coast Arts Plan 2018-2038.

For the purposes of this audience development study, this research has been conducted in four key phases, beginning with Planning and Co-design analysis in June 2020, progressing to Fieldwork in July–August, and Analysis and Reporting in September 2020.



Sunshine Coast Arts Plan overall goals

This research is delivering on goals set in the Sunshine Coast Arts Plan 2018-2038. The overall goals of the Plan are:

- ▶ Goal 1: Arts audiences and creative opportunities flourish through investment and development
- ▶ Goal 2: Art and creativity is embedded in the identity and experience of the Sunshine Coast.



Through this research, the overarching objectives of the Sunshine Coast Council and Sunshine Coast Arts Foundation are to:

- ▶ Increase attendances to arts events and venues in the region
- ▶ Develop new audiences and markets for the arts on the Sunshine Coast
- ▶ Develop audiences for specific art forms
- ▶ Enhance the profile and positioning of the Sunshine Coast as an arts and cultural tourism destination.

The intended outcomes for this research, as identified through the Co-design workshop include:

- ▶ Finding out more about the Sunshine Coast audiences, and being prepared for visitors
- ▶ Profiling existing audiences and building on existing, long-time supporters
- ▶ Identifying an audience framework or segmentation, and shared language for working together
- ▶ Identifying ways to deepen engagement and create new experiences for audiences
- ▶ Identifying new opportunities for artists
- ▶ Strengthening stakeholder relationships and cultivating support from the community.



Audience research framework

The research explores six key areas of enquiry to deliver on the project objectives

Audience profile	Motivations & barriers	Experiences & offers	Marketing	Future opportunities	Building support
<p>What venues and events have you attended recently?</p> <p>Which creative activities do you participate in?</p> <p>How often do you participate?</p> <p>How much do you spend on tickets, products, and donations?</p> <p>Demographics (e.g. age, gender, education, family, household income,).</p> <p>What else are you interested in?</p>	<p>What would make you show up (to an arts event)?</p> <p>What barriers have you experienced in attending?</p> <p>How do you define the 'arts'?</p> <p>Why do you attend?</p>	<p>How was your experience at [venue/event]?</p> <p>What has been a memorable arts experience for you?</p> <p>What makes a venue (Indoor/outdoor) good?</p> <p>What would you like to see in the future?</p> <p>How do you get to events?</p> <p>How far do you travel?</p>	<p>What's your trusted source for finding out what's happening?</p> <p>Which methods do you use for finding out about events?</p> <p>Who is influential in your community (e.g. social media, community networks)?</p>	<p>What do you think is the most exciting opportunity for Sunshine Coast in the future?</p> <p>Which groups/segment/organisations would you like to see collaborating?</p> <p>Which food and heritage experiences would you combine?</p> <p>Would you consider participating in digital experiences in the future?</p>	<p>How important are the arts on the Sunshine Coast?</p> <p>Would you consider donating/supporting to ensure the prosperity of the arts in our region?</p>

Methodology

Over 650 people participated in the fieldwork through interviews, focus groups and an online survey

In collaboration with the Sunshine Coast Council and SCAF at the co-design workshop, Patternmakers tailored a mixed methodology to explore the areas of enquiry:

- ▶ 8 qualitative depth interviews with key stakeholders
- ▶ 4 online focus groups (young people, parents, sporty residents, regular visitors)
- ▶ An online survey (quantitative and qualitative) of the Sunshine Coast audiences.

The survey population of ‘Sunshine Coast audiences’ is defined as residents and visitors who are ticket buyers or email subscribers to one or more participating arts organisations. The survey invitation was distributed through the databases of 11 participating organisations. It was open for 17 days, from 13 — 30 August 2020.

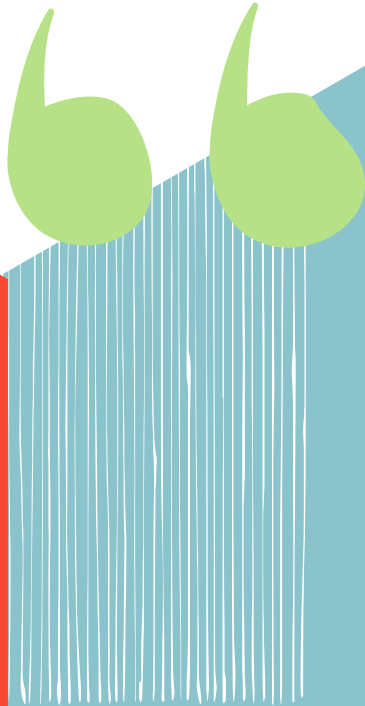
In total, 628 people completed the survey. A further 293 submitted partial responses, which are reported where appropriate.

The survey heard from audiences of 8 Sunshine Coast organisations

Table 1 displays the organisations that participated in sending the survey through a unique tracking link, and the number of responses received through each organisation’s unique tracking link. More than 20 respondents responded from each of 8 organisations, with smaller numbers from a further 3 organisations.

Table 1: Participating organisations and responses

Organisation	Database size	Number of responses to the online survey
The Events Centre	27,854	190
Venue 114	4,000	106
Horizon Festival	10,444	81
Sunshine Coast Council Gallery	5,124	80
Caloundra Music Festival	52,266 (Facebook likes)	77
Arts Coast	1,696	37
SCAF	157	27
USC Art Gallery	2,000	21
Sunshine Coast Creative Arts Alliance	1,700	3
Sunshine Coast Libraries	60,000	3
Sunshine Coast Stadium	4,215	1



'We are defining the character of the Sunshine Coast through cultural activities. Creating memories with our community'.

**Sunshine Coast survey respondent
2020**





Key findings

Cultural values

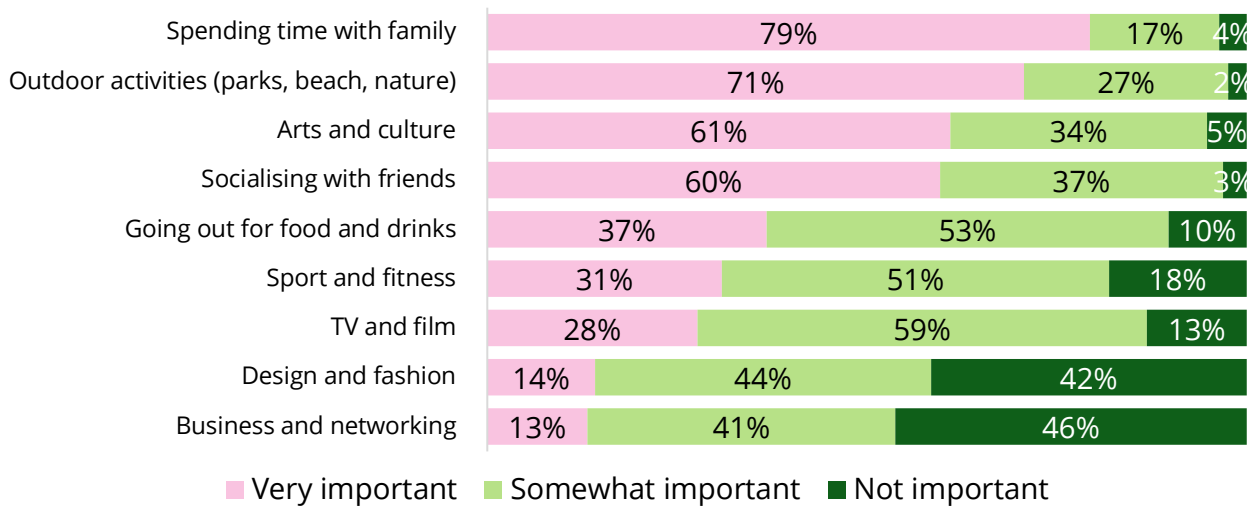
‘Spending time with family’ and ‘outdoor activities’ are seen as very important activities

Respondents were asked to rate the importance of various activities in their personal life on scale from ‘Not important’ to ‘Very important’ (Figure 1). A majority rated ‘spending time with family’ (79%) and ‘outdoor activities’ (71%) as very important.

Around two-thirds (61%) rated ‘arts and culture’ as very important, and a similar proportion (60%) rated ‘socialising with friends’ this way.

There may be an opportunity to leverage these values on the Sunshine Coast in programming decisions and audience development activities.

Figure 1. How important are the following activities in your life, generally speaking?
N=843





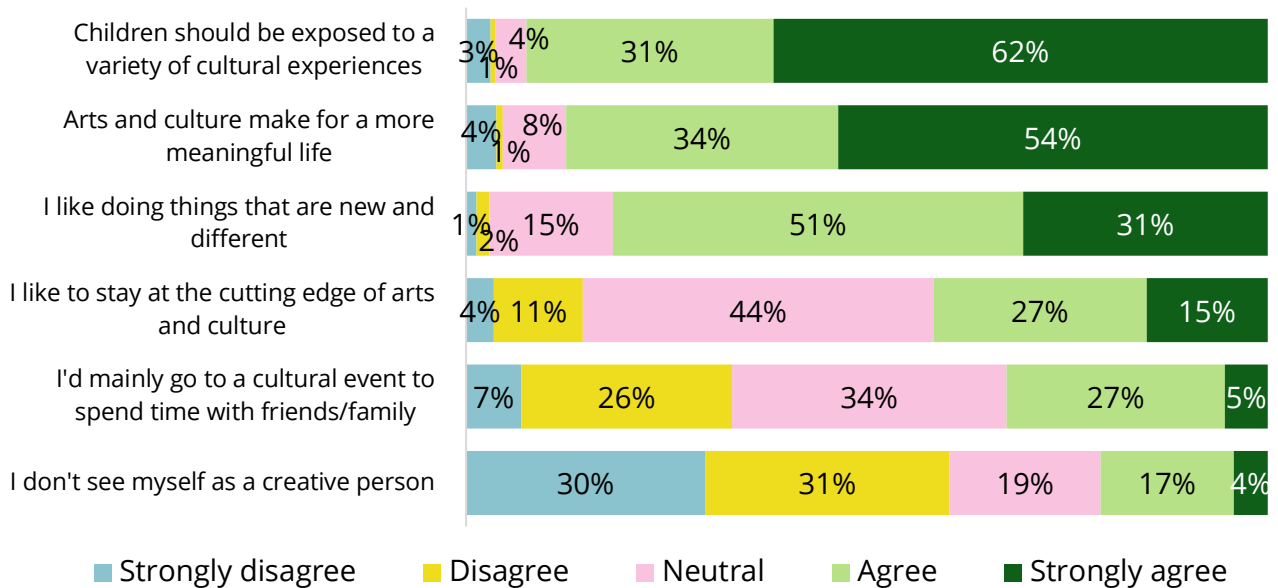
Survey respondents agreed that children should be exposed to culture, and that arts and culture make for a meaningful life

Respondents were asked to share the extent to which they personally agreed with several statements related to arts and culture (Figure 2). The majority (93%) said they ‘agree’ or ‘strongly agree’ that children should be exposed to a variety of cultural experiences. Many also agreed that arts and culture make for a more meaningful life (88%).

A large proportion (82%) agreed that they ‘like doing things that are new and different’, although this received a smaller proportion of people who ‘strongly agree’ (31%).

Further, less than half agreed that they like to stay at the ‘cutting edge’ of arts and culture (42%).

Figure 2. To what extent do you agree or disagree with the following statements?
N=837

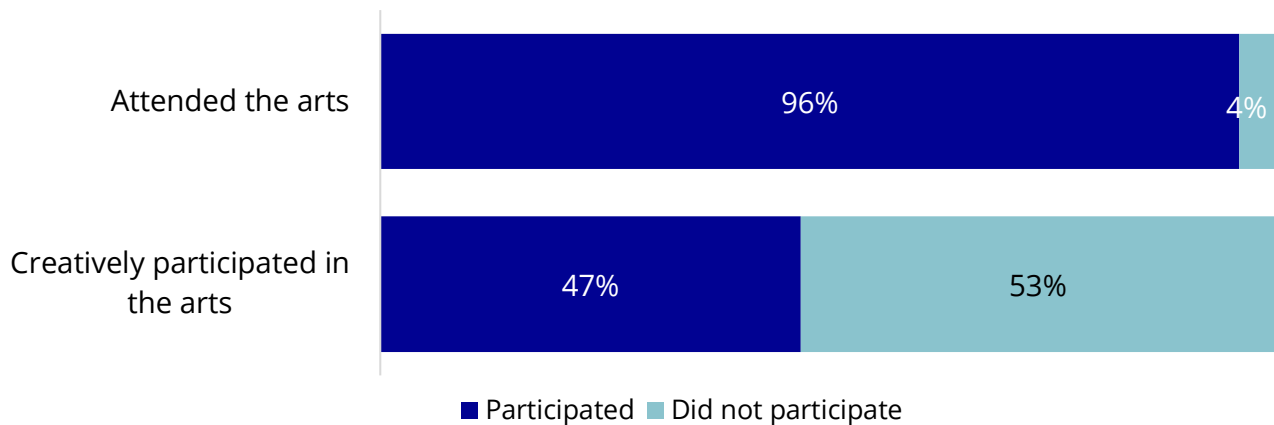


Arts participation

96% of respondents attended an arts event, of some kind, in 2019, while around half creatively participated in the arts

Respondents were asked to share whether, in 2019, they attended a cultural event, of some kind, or creatively participated in the arts (Figure 3). The majority (96%) said they attended a cultural event as an audience member, and slightly fewer than half (47%) participated creatively themselves.

Figure 3. Proportion who participated in at least one artform, 2019. Attended as audience member (N=843) and creatively participated in (N=838)



Music is the most common type of art attended, and one-third are creating visual arts and crafts

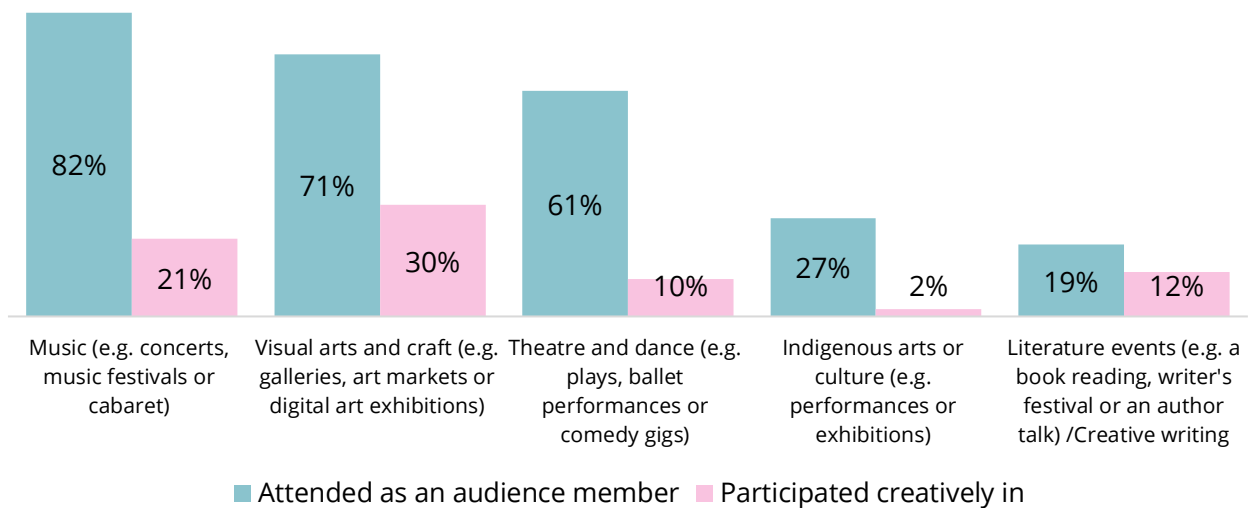
When asked to rate five key artforms attended as audience members (Figure 4), among all respondents the most common artform attended in 2019 was music (82%), such as concerts, festivals, or cabaret. This was followed by visual arts and craft activities (71%) and theatre and/or dance (61%).

Around one-quarter (27%) attended an Indigenous activity or event, and 1 in 5 (19%) attended a literature event in 2019.



Fewer respondents participated creatively themselves, though the largest proportion engaged in visual arts and crafts, such as painting classes, photography, or woodwork (30%). This is followed by playing or learning music (21%), creative writing (12%) and theatre and/or dance (10%). Very few respondents creatively participated in Indigenous arts and culture, such as dancing, as part of their cultural expression (2%).

Figure 4: Participation rates in five key artforms, attended as an audience member and participated creatively in... (2019). N=843

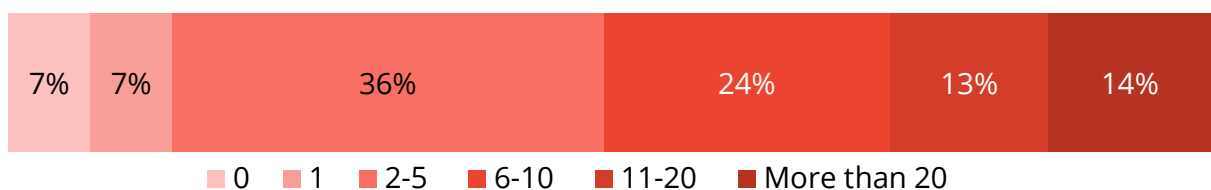


Occasional attendance at local events is common – only 27% are attending more than once a month

When asked to recall the number of times they participated in arts and culture events on the Sunshine Coast in 2019 (Figure 5), most respondents indicated that they attended occasionally: 2 to 5 times (36%) or six to ten times (24%).

Just 27% are attending arts and culture once a month, and there is opportunity to grow the frequency of attendance.

Figure 5: Frequency of attendance in arts and culture events on the Sunshine Coast (2019). N=823





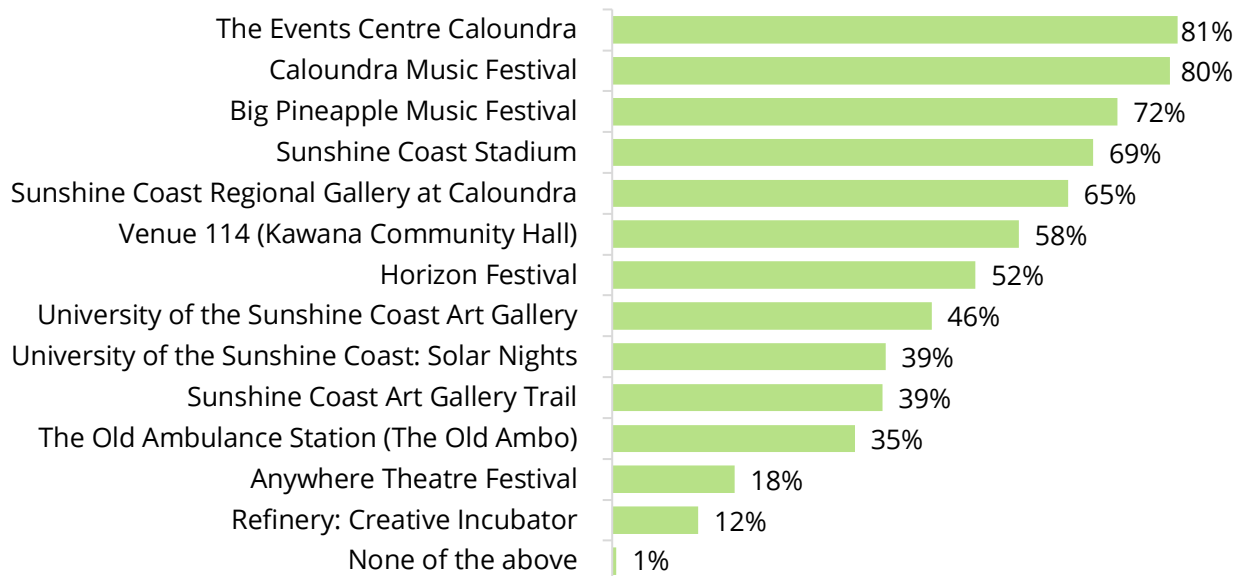
Most respondents have heard of the major performance venues – but there’s room to improve awareness of some venues and events

Among the survey respondents, who are engaged with participating stakeholder organisations, awareness of key venues and events on the Sunshine Coast is high (Figure 6).

Most respondents have heard of the key venues and events supported by the Sunshine Coast Council, including The Events Centre, Caloundra (81%), Caloundra Music Festival (80%), Sunshine Coast Stadium (69%) and the Sunshine Coast Regional Gallery (65%).

The highest rate of awareness of a non-Council related event is the Big Pineapple Music Festival, of which 72% of respondents said they have heard of it.

Figure 6: Which of the following Sunshine Coast venues and events have you heard of before? Select all that apply. N=808





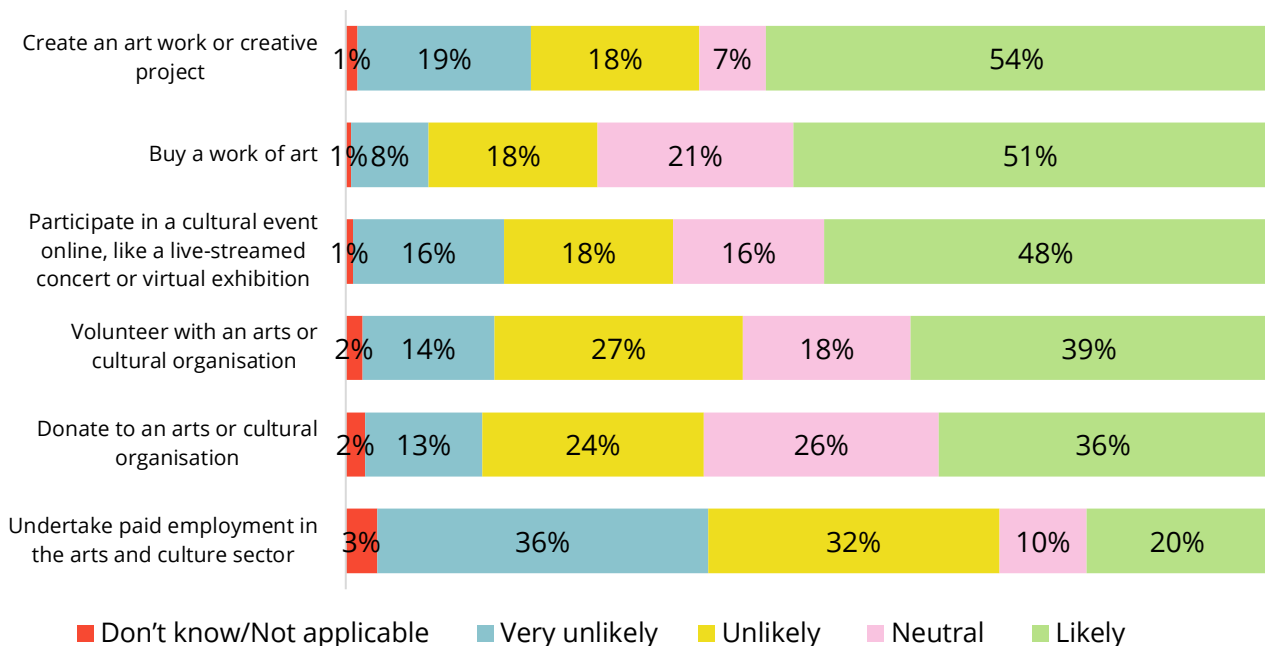
Around half are likely to create or buy a work of art, and many expect to participate online

Respondents shared the extent to which they felt it was likely, or unlikely, to undertake a range of activities related to arts and culture on the Sunshine Coast in the next twelve months (Figure 7).

The largest proportion (55%) said they were likely to create an artwork or do a creative project in the next 12 months. This was followed by the proportion who are likely to buy a work of art (51%) or participate in an online cultural event (48%).

On working in the arts and culture sector, more respondents say that they are likely to volunteer for an arts or cultural organisation (39%) than to undertake paid employment (19%).

Figure 7: How likely or unlikely are you personally to do the following, in the next 12 months? N=623





Attendance at local venues and events

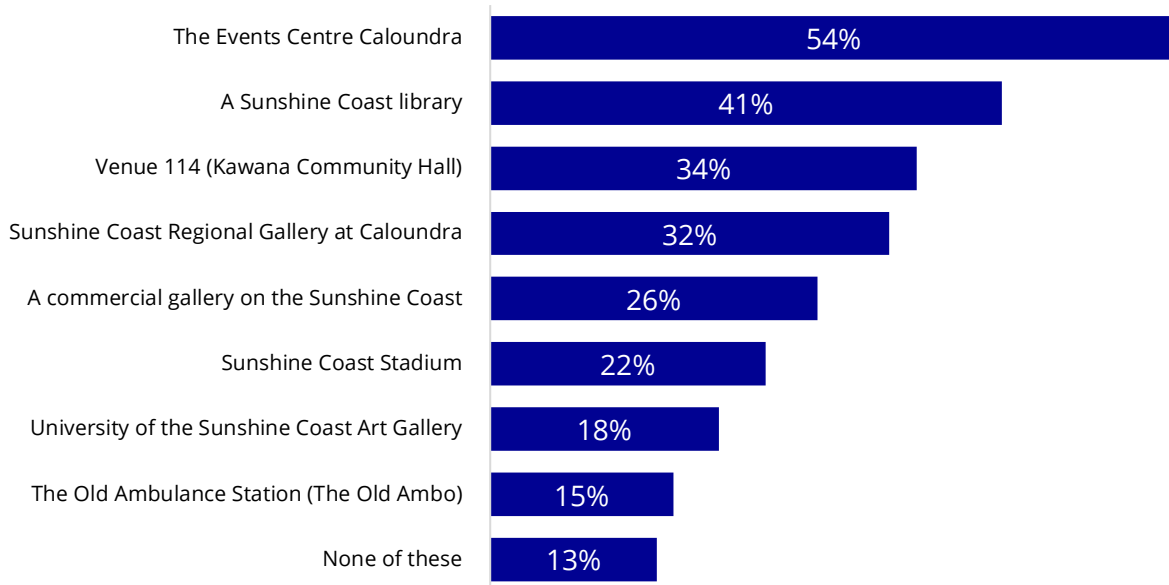
More than half (54%) attended the Events Centre in 2019 — 13% attended none of these

When asked which key Sunshine Coast venues they attended for an arts or cultural activity in 2019 (Figure 8), more than half (54%) said they attended the Events Centre, Caloundra. A large minority attended a library on the Sunshine Coast (41%), Venue 114 (34%), and the Sunshine Coast Regional Gallery (32%).

Around one-quarter attended a commercial gallery on the Sunshine Coast in 2019 (26%) and fewer attended the Sunshine Coast Stadium (22%), the University of the Sunshine Coast (USC) Art Gallery (18%), or the Old Ambulance Station (“The Old Ambo”).

Just 13% say they attended none of these venues, suggesting room for growing attendance in 2020 and beyond.

Figure 8: Proportion of audiences who attended key local venues (2019). N=641





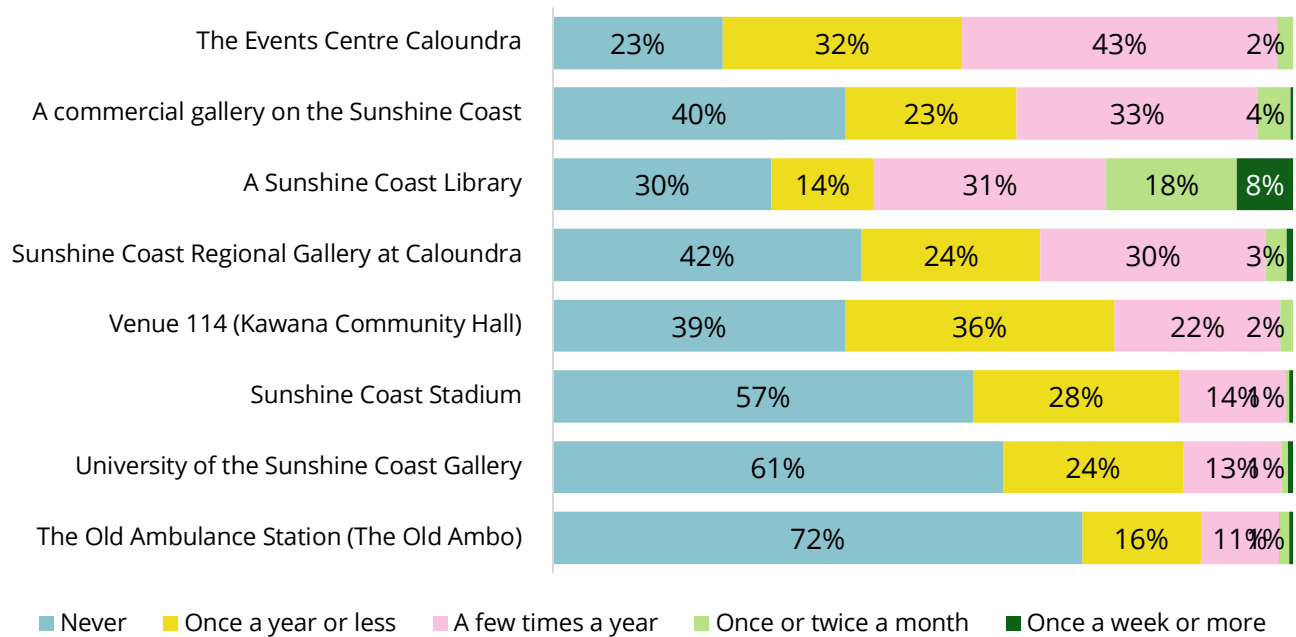
The library is attracting regular attendance, while other venues are attended irregularly

Respondents were asked to recall how often they attended eight specific venues on the Sunshine Coast for an arts or cultural activity in 2019 (Figure 9).

Libraries on the Sunshine Coast are attracting the most regular attendance, with 8% of respondents attending once a week or more, and 18% attending ‘once or twice a month’.

Other venues that are attracting a significant proportion of visitors ‘a few times a year’ are the Events Centre (43%), commercial galleries (33%) and the Sunshine Coast Regional Gallery at Caloundra (30%).

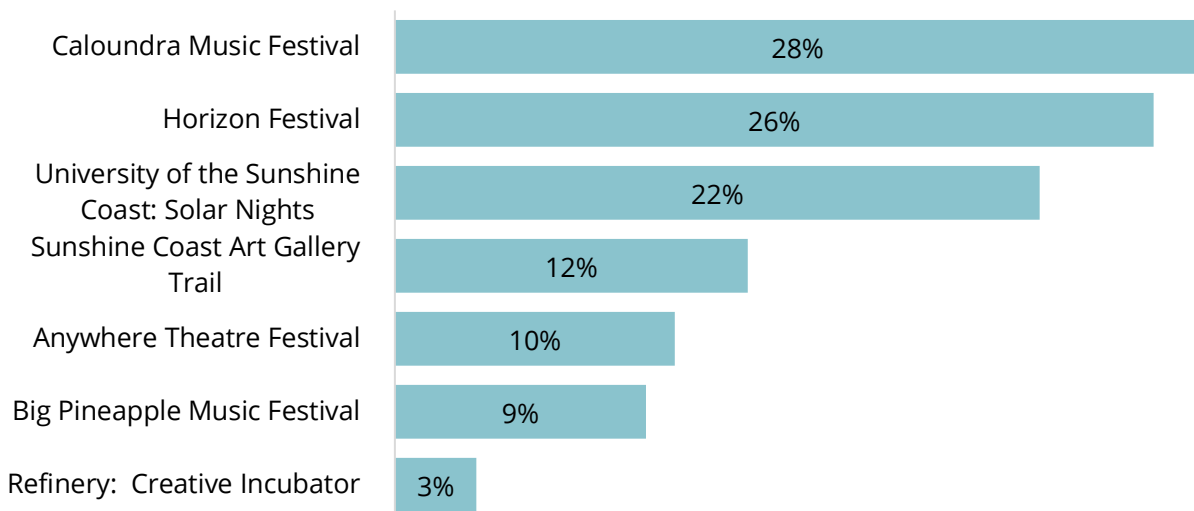
Figure 9: Attendance frequency at eight local venues (2019). N=502



One-quarter attended Caloundra Music Festival and Horizon Festival in 2019. When asked which major arts and cultural events on the Sunshine Coast they attended in 2019, the most common event selected was Caloundra Music Festival (28%), Horizon Festival (26%) and USC: Solar Nights (22%) (Figure 10).

Fewer people attended the Sunshine Coast Art Gallery Trail (12%), Anywhere Theatre Festival (10%) or the Big Pineapple Music Festival (9%). Very few attended Refinery: Creative incubator, though this event had a limited capacity of audience members.

Figure 10: In 2019, did you attend any of the following events on the Sunshine Coast? Select all that apply. N=686



Satisfaction

9 in 10 agreed that arts and creativity make the Sunshine Coast a better place, and they enjoy seeing local talent succeed

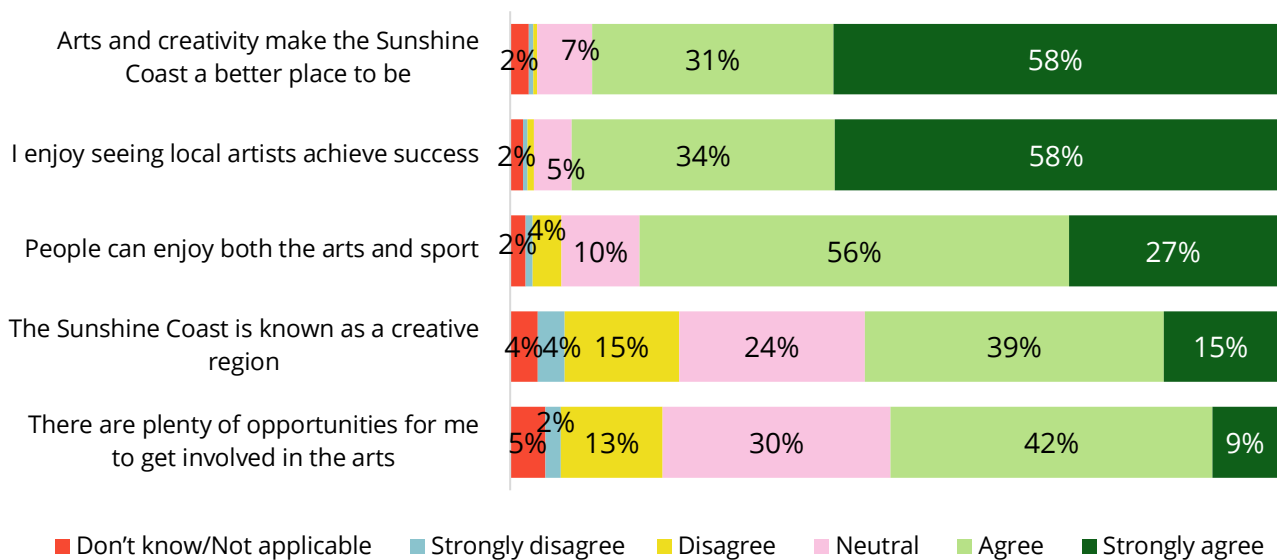
Respondents were invited to share the extent to which they agree with several statements about arts and culture on the Sunshine Coast (Figure 11). 9 in 10 agreed that arts and creativity make the Sunshine Coast a better place to be (89%) and that they enjoy seeing local artists achieve success (92%).

A majority believe that people can enjoy both the arts and sports (83%), though a smaller proportion 'strongly agree' with this statement (27%).



A significant proportion of people feel 'neutral' (24%) or at least somewhat disagree (19%) that the Sunshine Coast is known as a creative region. Additionally, a similar proportion feel neutral (30%) or at least somewhat disagree (15%) there are plenty of opportunities for them to get involved in arts and culture.

Figure 11: To what extent do you agree with the following statements about the Sunshine Coast? N=637



57% are satisfied with arts and culture overall on the Sunshine Coast — confirming an opportunity for the region

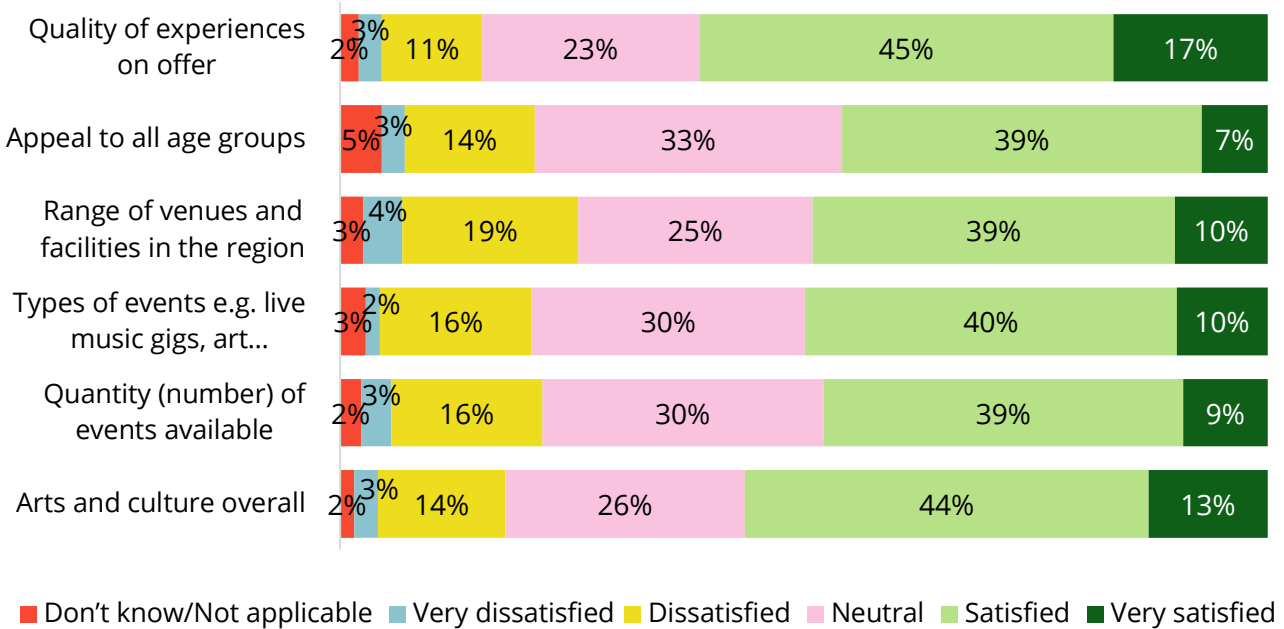
Overall, more than half (57%) feel satisfied with arts and culture on the Sunshine Coast, which represents a solid baseline from which to measure improvements and track progress over time (Figure 12).

Around two-thirds (62%) feel satisfied with the quality of experiences on offer, while around half are satisfied with the appeal to age groups (46%), the range of venues and facilities in the region (49%), the types of events on (50%) and the quantity of events available (48%).

There is also an opportunity to expand the segment who feel 'very satisfied' with these aspects, as the largest segment reports they are 'satisfied'.



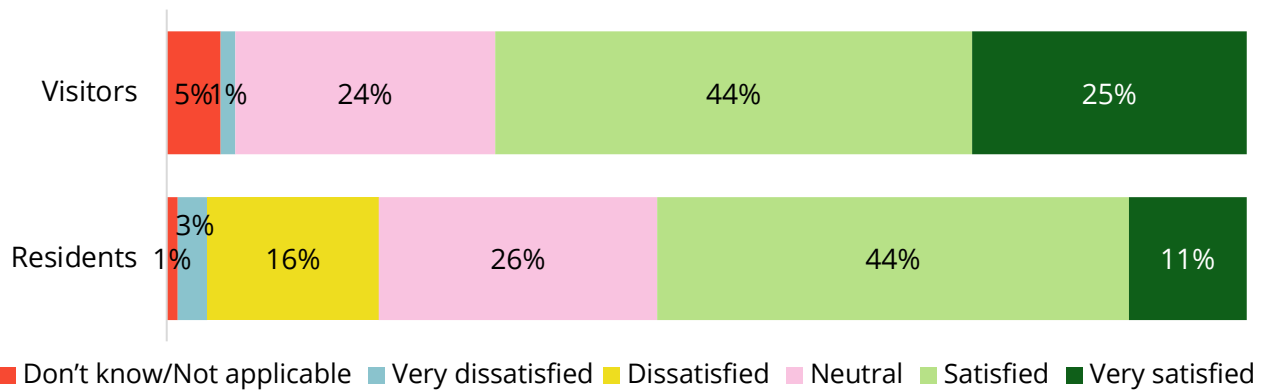
Figure 12: How satisfied or dissatisfied are you overall with...? N=649



Visitors are more likely to be satisfied overall, compared to residents

Among survey respondents, those who are visitors are more likely to feel satisfied with arts and culture on the Sunshine Coast overall (69%), compared to local residents (56%) (Figure 13). One interpretation of this is that residents have higher expectations of events year-round, while visitors may be responding to a more limited experience of a key event, such as Horizon Festival.

Figure 13: How satisfied or dissatisfied are you overall with... 'Arts and culture overall'? Residents (N=570) and visitors (N=79)





Further, compared to residents, visitors reported higher levels of satisfaction with the quality of experiences (76%, compared 59%), the range of venues (67%, compared to 47%) the type of events (72%, compared to 47%) and the quantity of events (63%, compared to 46%).

Arts and culture are seen as important for the community

When asked what is the 'best part' about arts and culture on the Sunshine Coast, some say they enjoy the community aspect of events, as one said,

'Your friends or relatives may be involved in it. Taking advantage of different locations that are unique to the Coast. Experiencing some superb talent on our doorstep. Getting out and talking to others who are attending'.

One person mentioned knowing people in their community who participate in local events, commenting,

'You do not have to travel far for arts and culture. For myself personally is the fact that I am sure to meet someone I know'.

Another respondent highlighted that arts and culture are helping to create a local identity, as they explained,

'We are defining the character of the Sunshine Coast through cultural activities. Creating memories with our community'.

Audience experiences

The Sunshine Coast Regional Gallery is enjoyed by attendees, but its presence could be improved

Respondents were asked to share their sentiments on recent experiences at key venues and events on the Sunshine Coast that they had attended in 2019. They were asked to describe what 'worked well' and what 'could have been improved' about their experience.

Overall, the majority of respondents had positive things to recall about their experience in 2019 and expressed their appreciation for the opportunity to experience arts and culture close to home.

In terms of experiences with specific venues they had attended in 2019, most people shared positive comments about the sites that are available for experiencing arts and culture locally. One person who visited Sunshine Coast Regional Gallery said:

‘Really beautiful space. Fantastic artwork. Friendly staff. Wonderful community building’.

When asked what could be improved about their experience at the Gallery, one person suggested more diverse programming:

‘I’d like to see art workshops run by professional art teachers, around meditation and mental health. To support children and adults to engage with the gallery and connect art with happiness’.

One participant mentioned a lack of visibility of the Gallery, commenting:

‘It lacks a "presence" or visibility. We could do with something like the Murwillumbah gallery’.

The Events Centre is known as the region’s iconic, large performance venue

Feedback from past attendees to the Events Centre commended its casual atmosphere, large size and ease of access. One survey respondent said:

‘The show, ease of parking/access, size of the auditorium allowed for easy viewing of the stage quite unlike many larger capital city venues’.

Another agreed, noting its ‘Casual feel, good seating, having a drink before’.

One suggested better accommodating for older attendees on the ground floor. They said:

‘Better comfortable seating in the main theatre that supports your back. Present seating on floor level is most uncomfortable for us older people/seniors’.

Horizon Festival is seen as a high-quality event, but awareness beyond arts audiences is limited

Horizon Festival received generally positive feedback from past attendees answering the survey. One person commended its interactive programming:

'Events/exhibitions in outdoor locations; experience nature/environment with art/culture. Exhibition with new VR technology - was new experience; Interactive performance - unique, intimate, experience'.

When asked how Horizon Festival could be improved, a lack of awareness was frequently mentioned, amongst survey respondents and focus group participants alike. As one survey respondent noted:

'Oddly, despite all the advertising, seems a lot of people still haven't heard of it! Mostly my info comes via internet as a past visitor to events'.

Another highlighted that the event may be too experimental, and perhaps an appeal to a general audience would attract more attendees. They suggested:

'More middle of the road arts attractions. Too edgy - only attracted arty types not common punters. A big drawcard like Arboria from a couple of years ago'.

Caloundra Music Festival is well-suited for families

Respondents who had previously attended Caloundra Music Festival were prompted to reflect on their experience in 2019. Most past attendees had generally positive feedback about the event overall, as one said:

'Everything about the festival from entry to facilities, food, entertainment choice, staging positions, scheduling'.

There is a view that the event is well-suited for families and young children, as one person explained:

'It's a great family friendly festival, exploring a good variety of artists and a good platform for emerging and local artists, also addressing music for all ages which is rare these days'.

One person advocated for maintaining a family-friendly atmosphere with restrictions on alcohol, commenting:

'The licensed areas are becoming bigger and bigger every year - part of the original appeal is that it is family-friendly and doesn't revolve around alcohol. I wouldn't like to see any more space given to drinking areas'.

The Sunshine Coast Library could benefit from improved communication about programs

Visitors to the Sunshine Coast Library noted its casual and welcoming atmosphere. One person shared:

‘Very social, interesting presentations. Casual and relaxed atmosphere’.

When describing what could have been improved about their experience, one recommended:

‘Parking is always a major issue for most events and often queues, as there are not enough staff to process’.

Another was inclined to mention advertising about events held at the libraries, as they explained:

‘I wish I had more warning about art events at the libraries. By the time I found out (thanks to the Caloundra Regional Gallery), it was too late to visit the exhibition. Perhaps more marketing or email updates as to what is currently going on would be useful’.



Barriers

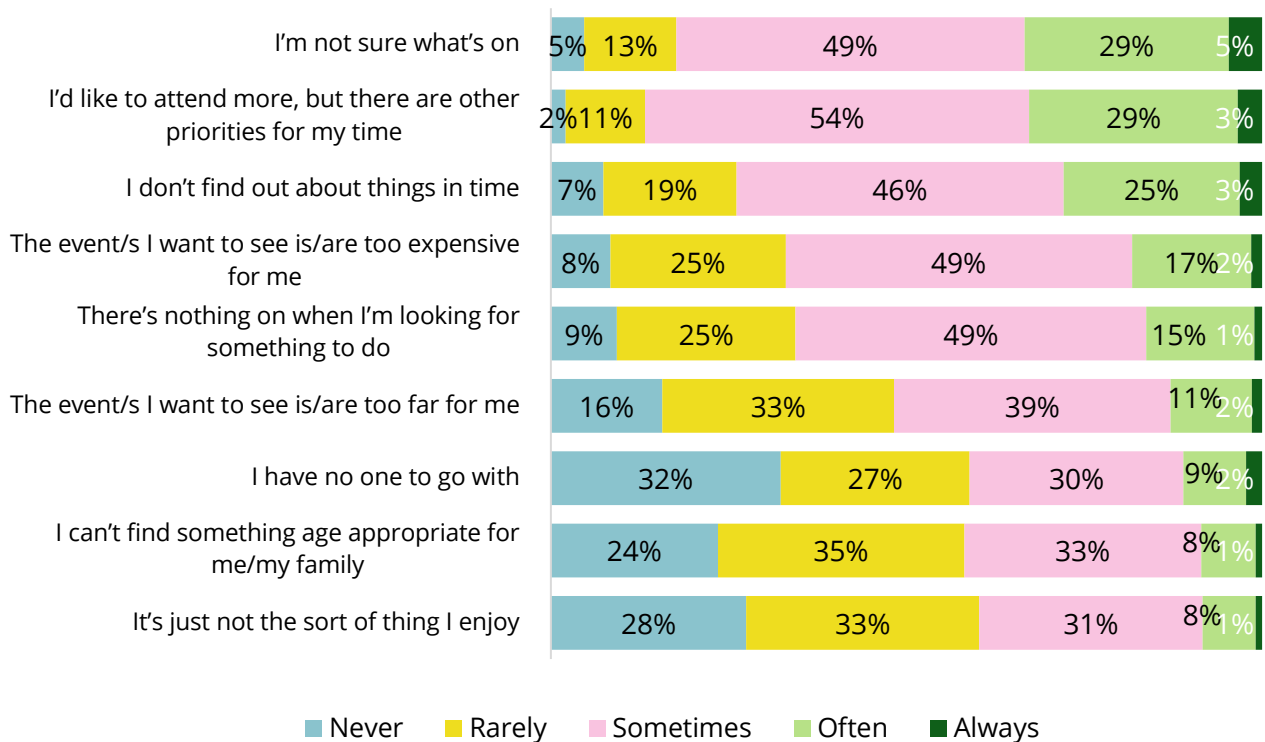
Most people would like to attend more events, but sometimes aren't sure what's on

Respondents were prompted to reflect on what has prevented them from attending arts and cultural events on the Sunshine Coast. From a list, they rated the extent to which they had experienced each barrier (Figure 14).

A majority said they are not sure what's on, at least some of the time (83%), with 29% experiencing this 'often'. A sizeable number also said they don't find out about things in time (74%).

There is also a large number of people who would like to attend more but have other priorities for their time — 86% experience this often.

Figure 14: To what extent have you experienced the following barriers yourself?
N=660





Survey respondents are favourable towards 'What's on' emails, Facebook, and venue e-news

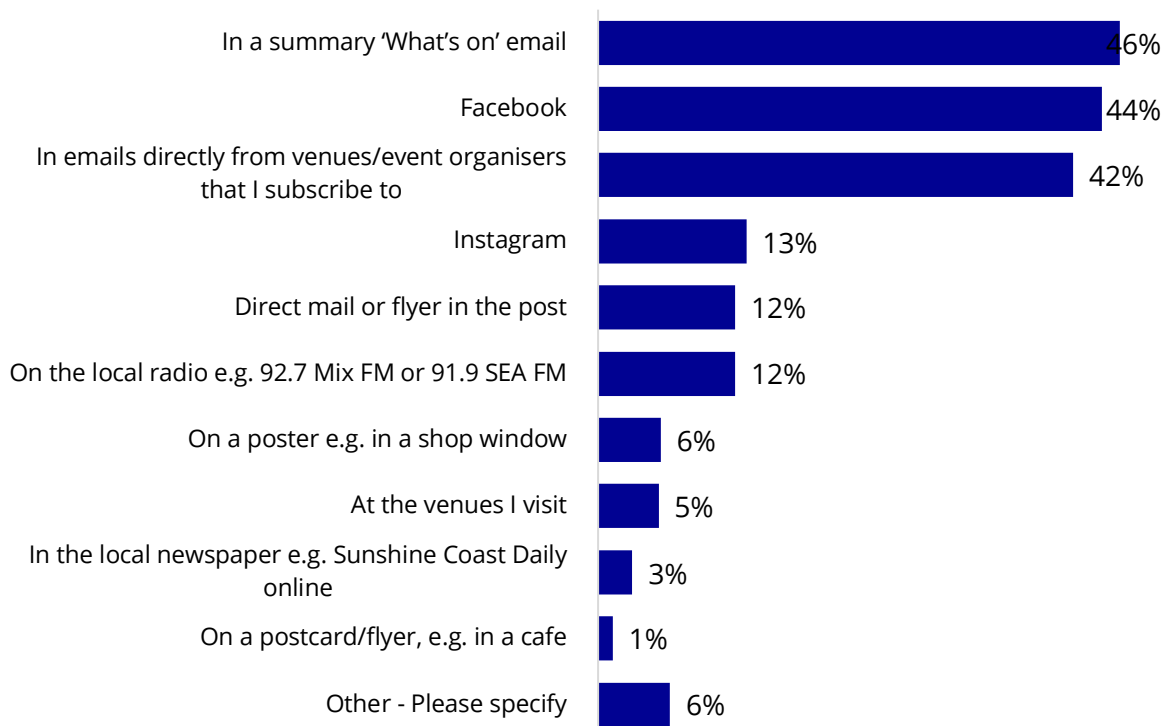
In terms of hearing about events happening on the Sunshine Coast, most survey respondents are favourable towards summary 'what's on' emails (46%) (Figure 15).

Other popular channels for awareness include Facebook (44%) and emails directly from venues/event organisers that they are subscribed to (42%). Fewer respondents selected Instagram (13%), direct mail or flyers (12%) or local radio (12%) as their preferred channel of awareness.

While Facebook is a powerful tool, event promoters report difficulties achieving 'organic reach', and increasingly need to pay for Facebook Ads to ensure that their content is prioritised by the platform algorithms.

It's important that the region builds strong audience email databases that it owns and controls, to mitigate the risk of relying on Facebook and other platforms out of its control.

Figure 15: How would you most like to hear about what's happening on the Sunshine Coast? Select up to two options. N=622



On their preference for hearing about events, many survey respondents would like their information consolidated in one place, such as:

'A regular printed newsletter advising of coming events, performances, shows. Especially since local newspapers are disappearing'.

Another person suggested:

'A newsletter that compiles all gigs and events on the coast, sent out digitally every month. I feel like I have to dig for information to find out what's on, and even the galleries I've subscribed to have events I didn't know about'.

Much of the feedback confirms strong demand for a central information hub for all arts and cultural activities happening on the Sunshine Coast, as one person commented:

'There needs to be a portal listing ALL the different events...a website or the like that covers all art and cultural events. If there is one already, I don't know about it and rely on email listings'.

These results confirm the importance of efforts by Sunshine Coast Council to lead on development of a What's On event listing and a regular EDM, which benefits a range of arts and cultural organisations along with other events.

There may be an opportunity to continue investing in professional development for arts marketers across the region

The third most popular way to find out about what's on is through emails directly from venues and event organisers (42%).

It's critical that customer relationship management, and in particular email marketing campaigns from local venues and events, is of the highest quality and professionally designed and optimised for frequency, open-rates, and click-through-rates.

Increasing awareness of cultural events in the region could benefit from stronger marketing capabilities, as one person suggested:

'More progressive marketing. Some of the marketing techniques used for cultural events seem outdated hence not enough people find out about them in time'.

There may be opportunities to support professional development of staff in digital marketing, to ensure that collectively, the region's cultural venues and events are reaching people effectively.

One interviewee highlighted that some key events could plan their promotion period further in advance, to ensure maximum reach:

'If the groups are organised enough and coming to [the media] to start promotion six months out, then they're more likely to get more publicity than weeks out. The media is like a second thought'.

Some groups are seeking more affordable events and activities

There is a view that arts and cultural events on the Sunshine Coast should be affordable, particularly for families. As one person shared:

'Offer cheaper events, particularly for families. Offer better discounts for concession card holders'.

Another agreed, particularly as a way to widen access to various cultural experiences, suggesting:

'Perhaps 'family' events could be a little cheaper. I think it's so important for children to experience all types of culture particularly orchestral and singing - lifelong experiences and memories'.

One person mentioned the challenge of making time for events, as a busy family:

'I would like to attend more but there are other priorities for my money. Attending as a family of 4 - 1 adult + 3 children can be expensive. I would like to attend more but the time of the performance is not always great'.

There is strong interest in more free outdoor, family-friendly programming

In line with the importance of outdoor activities for survey respondents, one idea that was commonly raised in the focus groups was delivering events in outdoor, public spaces. Several focus group participants suggested utilising public spaces that are already frequented by families and children, as one said:

'There are lots of big parks close to each other. Council could organise local musicians to play...let's invest some money in our local talent, put them in the park, build appreciation for local music. Let's have lots of smaller things rather than a couple of big things'.

Another participant agreed that smaller, more frequent events would create more opportunities for families to engage with arts and culture:

'It would be nice to have more family activities on weekends, not just in school holidays... It would be nice to have something a little bit more frequently. Occasional music acts, an excuse to get out'.

Sporty families are also attracted to outdoor experiences and 'doing something different'

Views among sports fans suggests that they would be attracted to a diverse range of activities, including arts and culture, if available. One focus group participant shared:

'I love rugby, but I love things like playing in the orchestra. Great to have a diversity of activities. I want my kids to experience different things'.

Another agreed,

'Love sport. Love going to festivals too – food and wine!'

When asked about the types of activities their 'sporty' family would participate in, one person said:

'The right environment and incidental is best. When you have to look something up and book it... it's difficult. Saturday morning, all day activities. If we have Nippers at the beach and there's something there, we'll do it'.

On incidental experiences, one focus group participant shared:

'It can be like an escape — take you out of your normal day'.

Most audiences want diversity and variety of cultural experiences

One common perception shared among research participants was that arts and culture experiences in the Sunshine Coast should capture greater variety and diversity of talent, as one commented:

'More cultural diversity. Better programming at The Events Centre in Caloundra - seems to rely a lot on cover acts, and performances targeted at an older WASP-type audience'.

One resident noted a comparison to other regional locations, commenting:

'It lacks depth and variety. We lack venues worthy of a substantial regional city'.

Young people noted this as a key barrier to their engagement with arts and culture locally, as one shared:

'When you've been here a couple of weekends, it's the same stuff, people at the markets during the day, someone else at a café doing live music. It gets a bit stagnant'.

A sports fan shared:

'We don't have enough events... we don't have the diversity or frequency. Elton John was out of the box - [we need] things that are more than a once off...few and far between'.

Some want to see the Sunshine Coast region raise the level of ambition for local talent

There is a view that arts and culture on the Sunshine Coast tends to be 'safe' and could be more ambitious in its development of talent. One interviewee shared:

'It's an emerging sector. The type of practitioners and the work being produced - generally it's quite conservative... University is one of the big drivers in the cities of experimental, edgy, and interesting...

It's about generating connections. Attracting more residents and attracting people from outside - to flavour the mix, to be more interesting'.

One survey respondent agreed, commenting:

'The art scene on the Sunshine Coast could be more open to discovering new talent. Many of the events organised are made up of 'safe' art that usually contains works that the organisers like, instead of being a valid representation of the talented artists that call the Sunshine Coast home'.

There is view that a leadership approach could be fostered within the creative community, as one person suggested:

‘Building capacity within our creative community – people who might be able to step up and lead [cultural events and activities]. Arming them with skills, capacity, people around them, to let them take on more of a leadership role within the sector’.

Young people are drawn to contemporary music and nightlife

Some comments indicated that cultural experiences for young people on the Sunshine Coast are considered ‘few and far between’, and some travel to Brisbane or Byron Bay to see something they are interested in. One young focus group participant said:

‘It’s hard to [find events] when you know there’s nothing happening on your doorstep’.

When asked where the gaps are in programming, several people mentioned a lack of night-time activities. One person shared:

‘Nightlife is lacking. When you turn seventeen, you want to party and have fun and do fun things. I haven’t felt like there’s much of that’.

One aspect of nightlife mentioned was the availability of food after hours, as one commented:

‘Eating later. Anything past 8:30, [there is] no dinner... You need a Visa to get into Caloundra past 8:00pm – it’s totally shut down. It’s really depressing, you feel so isolated’.

There is a view that options for young people are limited in the local region, and they become inclined to leave. As one person said:

‘We have one university. When people turn seventeen, your option is going to USC or you leave — you get a lot of people moving to Brisbane’.

In relation to the kinds of events activities they would like to see on the Sunshine Coast, comments were favourable towards contemporary music and a vibrant nightlife. One person shared:

‘Everybody wishes there was a bigger music scene, like the cities. That would start the fire for everything else around it. Music is the centrepiece’.

Along with more programming, one focus group participant suggested better promotion of events for young audiences, commenting:

‘More events and more advertising. Social media. A way to find out about that kind of stuff. Websites don’t really cover everything. You have to sign up to everything’.

They also expressed their appetite for an outdoor music festival, especially one that combines numerous experiences in a single event. One participant shared:

‘Splendour in the Grass is all encompassing — the food, camping, music, the side shows, all spread out...’.

Another suggested:

‘A one-dayer — a big day out. All the right music, the good energy. People just want a live music festival vibe’.

For some people, successful events require new and improved venues and facilities

Some people believe that existing venues on the Sunshine Coast could be improved, and that there should be a greater variety of venue types. Several people advocate for a central arts and culture centre, as one suggested:

‘A decent arts and cultural centre. Something that can host larger and better events’.

One interviewee highlighted that there is a lack of adequate facilities for artists and creatives to develop their work. However, they highlighted that this has generated a unique opportunity for practitioners:

‘There are no purpose-built rehearsal spaces for professional work. One of the positives is that artists are forced to develop work in non-traditional spaces’.

One survey respondent expressed the contradictory idea that there is a perception of the absence of venues — whilst also acknowledging a lack of awareness of existing ones:

‘It’s difficult because the Coast is a small place, so it can feel like that there isn’t enough. I think it needs better venues for gigs’.

An interviewee highlighted that existing venues can be better utilised, commenting:

'We have some great venues that are undervalued and underutilised, like the Events Centre'.

Some people see a particular need around visual arts

When asked what could be improved, some survey respondents specified a particular need around visual arts. One commented that there should be more sites to see visual arts, sharing:

'We need more accessible and affordable visual arts exhibiting venues'.

One interviewee acknowledged a lack of creative spaces and advocated for more spaces for artists to create their work in collaboration with others. They said:

'Visual arts: [There is] no maker space, no place to come together. No pathway to survival – that's where the arts separates from commerce'.

This view was shared among holiday makers, who revealed an interest in acquiring local art during their visits to the Sunshine Coast. One mentioned:

'Art galleries where you could purchase the work and go have a look'.

Another visitor shared their interest in local Indigenous visual arts, explaining:

'I'd like to see ownership. The Sunshine Coast has a lot of history, [so] creating more immersive sites where you're inducted into that area, and if [the local Indigenous community] would take ownership of those exhibitions'.

Transport is an issue for people who need to travel across the region for events

Several people highlighted the challenge of having events sparsely located across the region, and limited transport options to attend. One person suggested:

'[A] courtesy bus. Often festivals/performance/gallery openings lack car parking (and events often include wine) – [a] courtesy bus solves both problems'.

Another person recommended:

'Better public transport from the hinterland to coastal venues'.



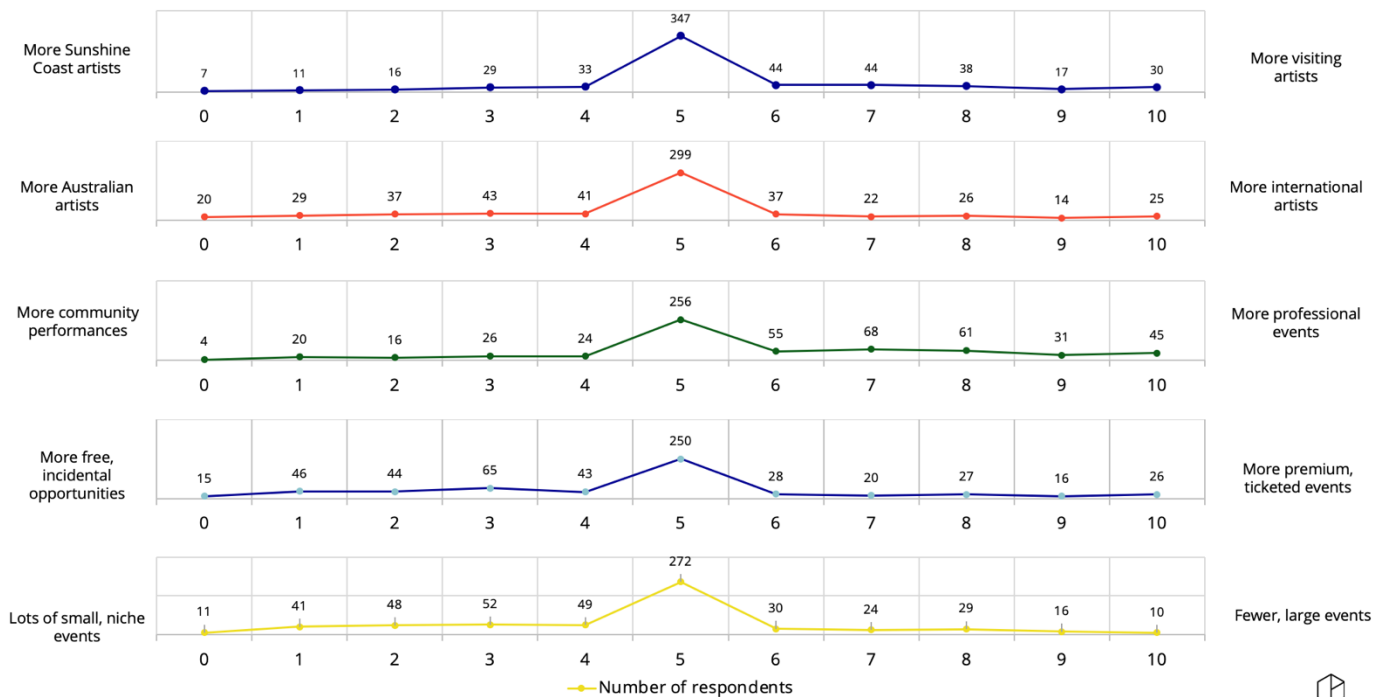
Opportunities

A balance of events is important, but many are in favour of more professional events and more free, incidental opportunities

Respondents were asked to select their preference out of a list of alternatives, using a sliding scale from 0 to 10. Each number in Figure 16 represents the level of preference for two opposing options. For example, the first chart compares 'more Sunshine Coast artists' (0) to 'more visiting artists' (10).

Most respondents were interested in a balance of different types of events and activities, demonstrated by the majority of responses clustered around the middle (5) on each scale. However, there is stronger preference for professional events rather than community performances, as well as more visiting artists, and more free, incidental opportunities, as opposed to more premium, ticketed events.

Figure 16: 'This or that' alternatives ...N=615

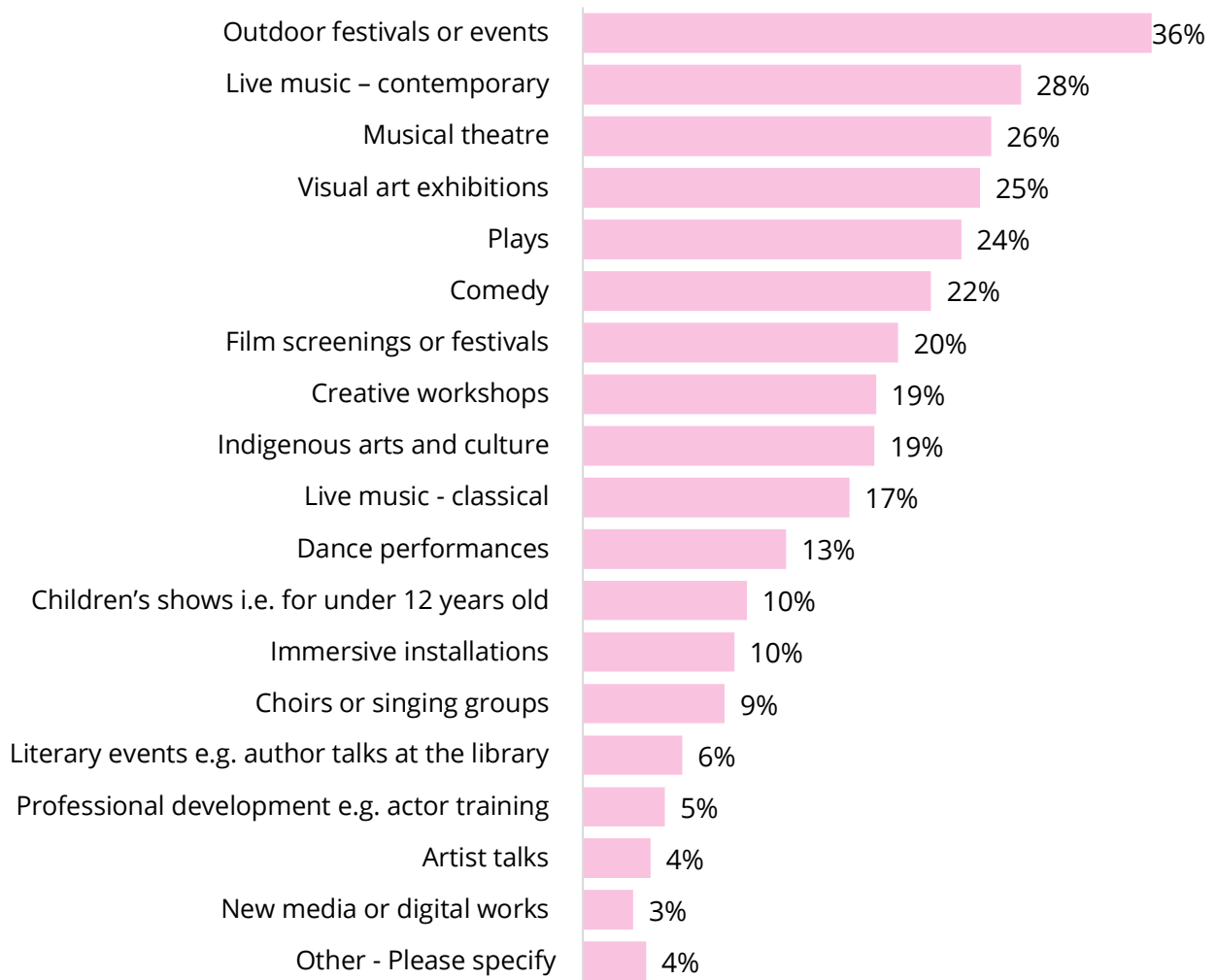




1 in 3 (36%) want to see more outdoor festivals or events and 1 in 4 (28%) would prioritise more live music

When asked to select their three most preferred types of artforms, the largest proportions selected outdoor festivals and events (36%) and live contemporary music (28%) (Figure 17).

Figure 17: From the following list, what do you want to see more of on the Sunshine Coast? Please select up to three. N=633

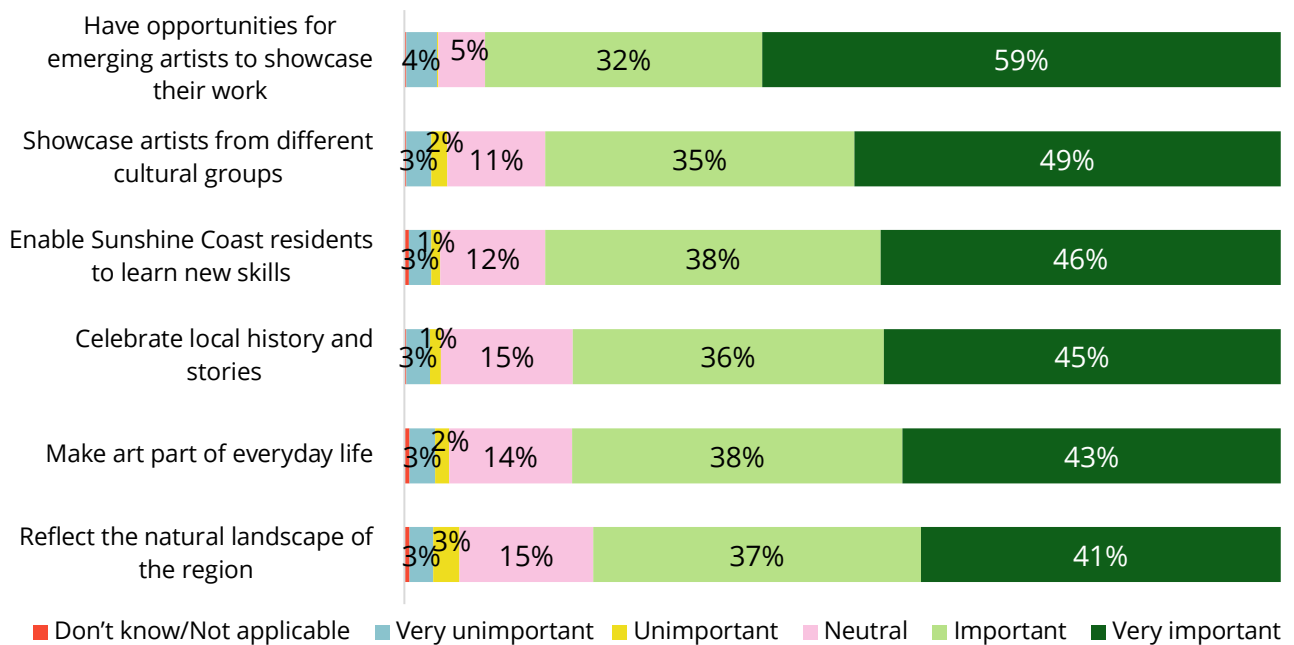




Most people agree with positive statements about developing arts & culture in the region

When prompted with a list of future opportunities for developing arts and culture on the Sunshine Coast in future, the majority of people agreed with all statements to some extent (Figure 18).

Figure 18: How important is it for the Sunshine Coast region to...? N=626



There are opportunities to support and uplift emerging artists

Several respondents expressed a desire to support emerging artists, as one said:

‘The opportunity for emerging artists to showcase their work; and the local diversity supported and promoted by the events’.

Another commented:

‘It is forever changing with the young population. Viewing incredible fresh ideas from young students as well as seeing many mature artists improving and changing their skills’.

There is also support for international acts, as one said:

‘While I support local talent, I also think that exposure to professional and quality visiting artists and events would also further improve the overall quality and ambition of local artists - there is nothing like raising the standards bar to challenge and stimulate local creativity to even better things’.

One explained the importance of balance:

‘Balance is the key. Having professional / International artists supported by local artists is a great way of giving our local artists great exposure and experience’.

There is an important opportunity to activate the Kabi Kabi arts community

Several research participants acknowledged that the Sunshine Coast is home to an already active Indigenous arts community, and that they enjoy participating in events that involve or are led by the Kabi Kabi community. Commenting on what they believe works well, one survey respondent said:

‘The Aboriginal and Torres Strait Islander culture being incorporated [into arts and culture events] and the many free events that are great for children’.

When asked how arts and culture on the Sunshine Coast could be improved, some research participants mentioned that more could be done to incorporate and activate the local Kabi Kabi culture. One survey respondent shared,

‘We have been looking for more Indigenous arts and cultural activities’.

Other comments included:

‘More Indigenous recognition of place - so locals and visitors can personally acknowledge that the history of visitors to this region goes back 1000's of years - more permanent signs and education’.

Another research participant advocated for strong representation of Kabi Kabi culture in developing Indigenous arts for the region, commenting:

‘What is really important is for us to be approaching the development of a strong and dynamic arts and cultural industry with integrity and putting Kabi Kabi arts and

cultural expression at the centre of it. Other Indigenous artists will be involved in having a vibrant Indigenous arts industry’.

While it is important to showcase the various Indigenous cultures that currently reside there, one person said:

‘Right at the centre it has to be Kabi Kabi peoples because we are the first people. It’s our intellectual and cultural property’.

There are opportunities to interweave Kabi Kabi arts and culture and existing offerings on the Sunshine Coast. This interviewee suggested:

‘Big initiatives, like the Horizon Festival, to have — running parallel or wrapped around — a developmental program for Kabi Kabi, but also for First Nations artists more broadly’.

Arts and culture should foster greater connection to the environment

When discussing opportunities to develop arts and culture on the Sunshine Coast, one interviewee mentioned that connecting to the region’s unique landscape is key:

‘Aiming to better reflect a sense of place and country, as well as architecture and landscape, to reflect the look and feel of the region... There are amazing opportunities to augment the natural environment e.g. something around Whale Song migration, Mt Coolum dreamtime’.

Others shared that the unique environment of the Sunshine Coast should be celebrated through arts and culture, as another research participant commented:

‘The beauty. [There is] a whole culture wrapped around all of that, including all the colours that are dominant up here. Blues and greens, the Hinterland, the landscape throughout and across to monumental landforms. It’s pretty spectacular. Mt Coolum — in Indigenous terms — is our Uluru of the Sunshine Coast’.

This view was shared among focus group participants who regularly visit the region on holidays. As one person shared:

‘Whatever it is, it needs to be authentic to the Sunshine Coast... have a story behind it... What’s intrinsic to that area? Nature - sand, ferns, rainforest...’.

Another participant expressed:

‘For cultural tourism to be successful: it’s important that programming appeals to locals first. To make the Sunshine Coast a cultural destination, you need to have solid support based locally for that to be authentic’.

Many advocate for a cohesive and collaborative approach to developing arts and culture

On what could be improved about arts and culture on the Sunshine Coast, one person suggested:

‘There are so many pockets of creative enterprise which are the building blocks of a regional arts identity, but a cohesive approach in developing these can produce an iconic identity for the region’.

Similarly, one interviewee highlighted the importance of entrepreneurship in providing continuity:

‘We’re now approaching 350k population and we should be looking for more regular cultural events... Consistent entrepreneurship is needed in the arts space by people who know what they’re doing.’

Target segments

Respondents who are likely to donate are over 35 years of age and highly engaged in arts and culture

An analysis of 222 respondents who shared that they would be likely to donate to an arts or cultural donation in the next 12 months revealed that this segment tends to be highly engaged in the arts, and generally in the 35-69 age cohort (66%).

This list (overleaf) highlights key characteristics of respondents who stated that they are ‘likely’ or ‘very likely’ to donate in future. It includes some comparisons to respondents who said they would be ‘unlikely’ or ‘very unlikely’ to donate (“non-donors”).

Demographic information

- ▶ Mostly residents of the Sunshine Coast (88%), like non-donors (88%)
- ▶ More likely to earn a living from making or selling art themselves (30%) compared to non-donors (13%)
- ▶ More likely to have a Bachelor or higher degree (60%) compared to non-donors (54%)
- ▶ More likely to work full-time (28%) compared to non-donors (25%)
- ▶ Interested in 'What's On' emails (46%) or Facebook (45%)

Arts behaviour

- ▶ Twice as likely to attend Indigenous arts (41%) compared to non-donors (15%)
- ▶ More likely to have attended visual arts in 2019 (87%) compared to non-donors (61%)
- ▶ More likely to seek visual art exhibitions in future (34%), compared to non-donors (18%)
- ▶ More likely to attend arts and cultural events monthly (11–20 times per year) (17%) compared to non-donors (9%).

Values and attitudes

- ▶ More likely to 'strongly agree' that arts & culture makes for a more meaningful life (74%) compared to non-donors (40%)
- ▶ More likely to see themselves as a 'creative person' (41%) compared to non-donors (22%).

Seven key demographic segments emerged as potential targets across the region

On the importance of identifying key audience segments in the Sunshine Coast community, one interviewee commented:

'Understanding audience segments and their needs is more important than generic offerings...We need to really drop the idea of massive crowds and infiltrate different segments of the market very well'.

Breakdowns of target segments on the Sunshine Coast, related to frequency of attendance, as well as age and lifestyle, are included overleaf (Tables 2 and 3).



Table 2: Audience segments by frequency of attendance at arts and cultural events in 2019

Segment	Infrequent attendees	Occasional attendees	Frequent attendees
Defined as...	Attended the arts 0 to 5 times	Attended the arts 6 to 20 times	Attended the arts more than 20 times in 2019
% creating themselves	36%	58%	87%
% satisfied overall	51%	61%	63%
Top channel(s)	Facebook (45%)	Emails directly from venue and event organisers (45%) or a summary 'What's on' email (45%)	A summary 'What's on' email (53%)
Most desired events	Outdoor festivals (36%) and musical theatre (30%)	Outdoor festivals (36%) and visual art (27%)	Outdoor festivals (36%) and live music (30%)
Values & attitudes	Spending time with family (80% 'very important')	Spending time with family (80% 'very important')	Arts and culture (85% 'very important')
More likely to...	Create an artwork (43%) or buy a work of art (43%)	Create an artwork (58%) or participate in a cultural event online (55%)	Create an artwork (82%) or buy a work of art (71%)
Sample size	410	305	112

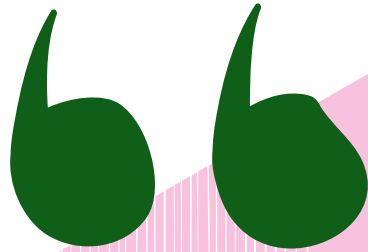


Table 3: Target audience segments by age and lifestyle

Segment	Youthful ambition	Family fun	Older & altruistic	Holiday mode
Defined as...	Under 35	35-49, kids living at home	60+	Visitors to the Sunshine Coast
% attending monthly	26%	29%	28%	11%
% creating themselves	51%	55%	54%	46%
% satisfied overall	58%	57%	58%	70%
Top channel(s)	Facebook (65%)	Facebook (63%)	Direct & 'What's on' email (49%)	Facebook (57%)
Most desired events	Outdoor festivals or events (69%)	Outdoor festivals/events (54%)	Musical theatre (32%)	Outdoor Festivals (53%)
Values & attitudes	Like doing things that are new and different (84%)	Agree that children should be exposed to a variety of cultural experiences (68%)	Agee that arts and culture makes for a more meaningful life (92%)	Enjoy seeing local artists achieve success (91%)
Key locations	Beach, cafés, bars	Nippers, parks, playgrounds	Community centres	Eumundi Markets, Airbnbs, wait staff at local cafes



Segment	Youthful ambition	Family fun	Older & altruistic	Holiday mode
More likely to...	Do an artwork or creative project (52%) Buy a work of art (52%)	Participate in a cultural event online (60%) Buy a work of art (60%)	Create an artwork or creative project (53%) Buy a work of art (50%)	Create an artwork or creative project (48%) Buy a work of art (45%)
Barriers	Lack of variety for young people	Competition for time & money	Physical access	Getting the timing (and wardrobe) right!
Drivers of participation	Edgy experiences Casual atmosphere Availability of food and drink Interactive & energetic	Being outdoors Fun for the whole family Exposing kids to variety Affordability	Ease of access Mid-week daytime activities Variety Connecting with others	Discovering hidden gems Making memories & taking something home Authentic Sunshine Coast
Sample size	69	99	397	124



'It's about generating connections. Attracting more residents and attracting people from outside - to flavour the mix, to be more interesting'.

**Sunshine Coast survey respondent
2020**



Opportunities

Planning

Sharing the research findings with the Sunshine Coast community

This report identifies a few short-term opportunities that can be undertaken within the next three to twelve months, to maximise the potential and reach of the research.

The Sunshine Coast Council and SCAF may host a group event to share the research findings among the Sunshine Coast region's arts and culture stakeholders. This event could involve a presentation, panel discussion, Q&A and/or workshop session, to dissect and interpret the findings as a group, identifying deeper insights and testing opportunities.

It is also recommended to update survey respondents on the results when they become available, and the actions planned based on the research.

Setting an Audience Development Plan for the region

A second short-term opportunity would involve collaborating on an Audience Development Plan for the region, to set a strategy based on the research and identify shared goals, roles, timelines, and resources within the Sunshine Coast Council and SCAF.

Meaningful audience development is a long-term process that requires commitment from a wide range of stakeholders. It will rely on a range of different factors, including:

- ▶ Local venues and events continuing to grow attendance and patronage at their individual events through continuously improving programming and marketing
- ▶ Stakeholders working together, coordinating activities and cross-promoting each other to achieve shared objectives
- ▶ Strategic investment to fill gaps in current programming and events
- ▶ Attracting more residents and visitors to the region who value arts and creativity and building investment in creative enterprise
- ▶ Actions for all life stages and all levels of the education system (Research shows that one of the most powerful factors that determine arts engagement is education).

A dashboard (in Excel or a similar format) should be created to track progress on key indicators of success.

Consulting with stakeholders and accessing expert advice

The Sunshine Coast Council and SCAF should seek professional and community advice on access and inclusion, to provide recommendations and guidance for venues and events across the region.

There may also be an opportunity to consult with the Kabi Kabi community about opportunities for greater integration of Indigenous arts practice and leadership in future programming strategies.

Marketing

Raising awareness of the full range of local venues and events

There is an important opportunity to increase the level of understanding and awareness of the full range of venues and events locally and activate underutilised spaces for events and participatory activities.

While most survey respondents demonstrated awareness of key venues and events, broader community sentiments suggest that there is little knowledge of key venues and events beyond those that are involved or invested in arts and culture. Two key steps in this process may involve improving signage (e.g. for the Sunshine Coast Regional Gallery) and greater utilisation of key marketing channels.

Building guidelines for best practice marketing

Consider ways to support professional development of marketers across the region, and consider the case for best practice marketing guidelines, for example, seeking advice on paring back language to avoid intimidating people.

It's important that the region develops a workforce of skilled digital marketers and stays abreast of developments in email and social media marketing.

Launching a centralised 'What's on' website and regular emails

Commentary from survey and focus group participants indicated strong demand for a centralised information hub, including 'What's On' website or regular emails about events and cultural activities in the region.

This confirms a key opportunity to renew efforts for a 'What's on' website, to grow awareness and participation in cultural events and activities across the region. The website would also host a region-wide audience database managed and owned by the Sunshine Coast Council and SCAF.

Long-term management of this initiative would involve an ongoing review of the event listings and calendars to identify gaps in relation to audience interests and increasing programming in a strategic way.

Programming

Progressing audience development through 'gateway experiences'

Views from some research participants highlighted that arts and culture on the Sunshine Coast tends to be 'safe', and less than half of respondents said they enjoy being at the 'cutting edge' of arts and culture (42%).

One recommendation is developing audiences for more diverse arts and culture through gateway experiences or delivering traditional and popular work alongside more 'edgy' work, particularly in broadly accessible contexts such as Horizon Festival. A successful approach would involve enlisting organisations with large databases and large audiences for strategic cross-marketing of taster events and opportunities for participation.

Another aspect involves paring back any language that could be considered intimidating or alienating to the broader community. It will be important to utilise accessible and inclusive language, as advised through the Audience Development Plan consultations.

Growing opportunities for weekly engagement in events, and offering more commitment when needed

Survey and focus group data indicated that there is appetite in the community for smaller, year-round arts and culture activities to engage with on a regular basis.

A successful approach would focus on increasing programming of regular events by growing opportunities for weekly engagement (e.g. life drawing). To complement regular engagement and satisfy demand from more engaged segments, venues and organisers should offer more commitment, where needed.

Activating public places across the region with art

Findings from the Audience Outlook Monitor indicated that Australian audiences are increasingly favourable to outdoor events in public places, which have ventilation and enough space to apply social distancing practices. This is particularly evident among Queensland-based audiences, of whom 40% would rank an outdoor event as the most preferred option for attending a cultural event right now.¹

Event programming should consider ways to activate public places with arts installations and cultural events as the COVID-19 pandemic passes. One suggestion is supporting guerrilla art in high traffic areas throughout the region, to promote 'incidental' cultural experiences.

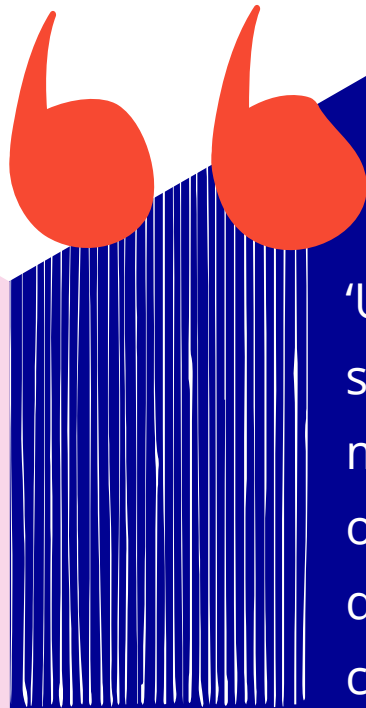
There is opportunity to re-ignite busking, locally across the region and to consider regular programming of events, such as the Sunday Sessions and busking festivals.

Cultivating partnerships with artists, local business, and entrepreneurs

One long-term recommendation is to consider ways to incentivise investment in regular arts event programming across the region. Partnerships should be cultivated between local businesses, artist collectives and entrepreneurs, through grants or concessions on spaces.

There may be opportunities for more powerful advocacy, with the Sunshine Coast Council and across the region, to promote the Sunshine Coast in local, national, and international contexts and identify cases for further investment and development.

¹ Patternmakers (2020). *COVID-19 Phase 3 State/Territory Snapshots*. [online] Available at: <https://www.thepatternmakers.com.au/blog/2019/4/5/audience-outlook-monitor-phase-3-state-snapshots-gpkb2> [Accessed 30 October 2020].



‘Understanding audience segments and their needs is more important than generic offerings...We need to really drop the idea of massive crowds and infiltrate different segments of the market very well’.

Sunshine Coast interviewee
2020





Appendix

Audience profile

Around 9 in 10 (86%) survey respondents are Sunshine Coast residents

The majority of respondents to the online survey said they are residents of the Sunshine Coast (86%), while 8% are visitors from Brisbane, and 4% from elsewhere in Queensland (Figure 19).

Figure 19: Are you a resident or visitor to the Sunshine Coast? N=880

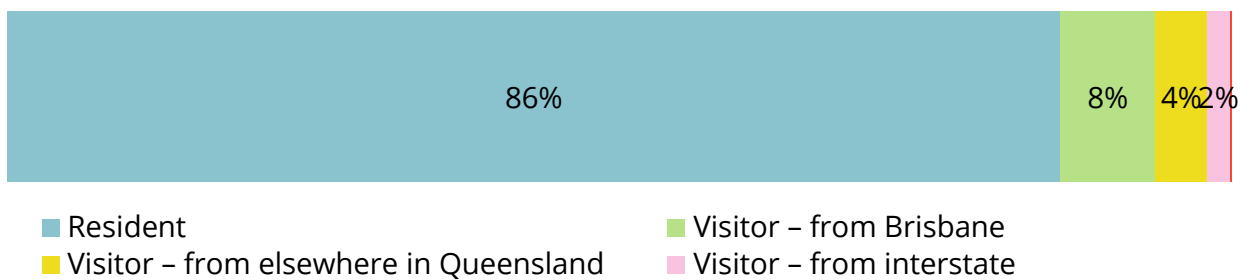
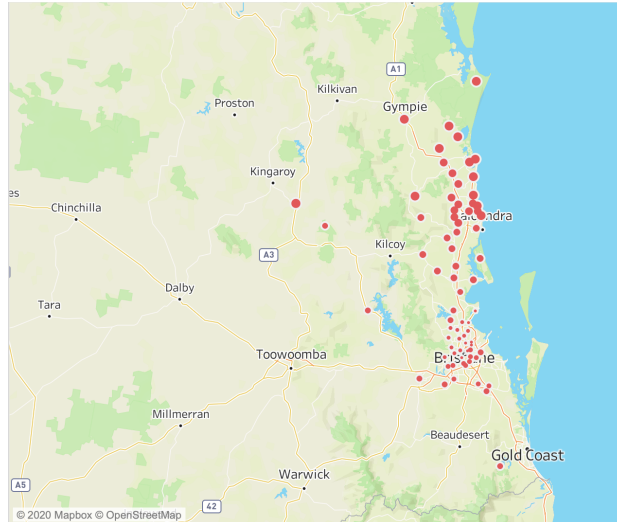


Figure 20 (overleaf) displays the geographic spread of respondents' post codes, with the larger dots representing a higher frequency of each post code. A majority of respondents cluster on the Sunshine Coast and Greater Brisbane regions.



Figure 20: What is your post code? N=617



Three-quarters (77%) of respondents are female, and 70% are between 35 and 69 years old

Most respondents (77%) identify as female, 22% male and 1% said they would prefer not to say (Figure 21 & 22).

1 in 4 (24%) are aged between 35 and 49, and the same proportion (24%) are aged 60-69.

Respondents aged over 60 represent 43% of the total survey respondents.

Figure 21: Do you identify as...? N=626

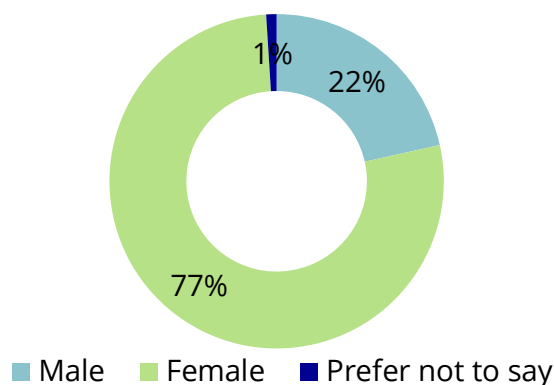
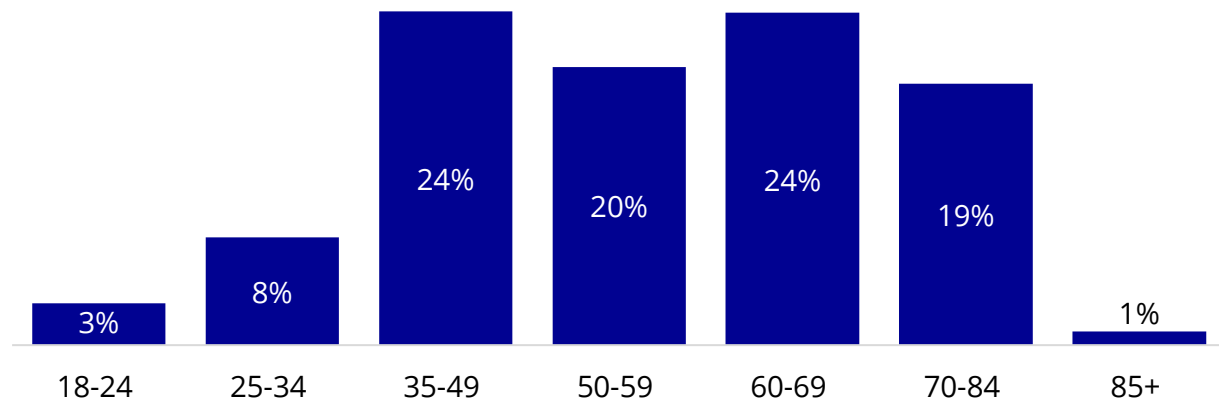




Figure 22: What is your age group? N=626



One-quarter (26%) live with children — and half (50%) of those have teenagers at home

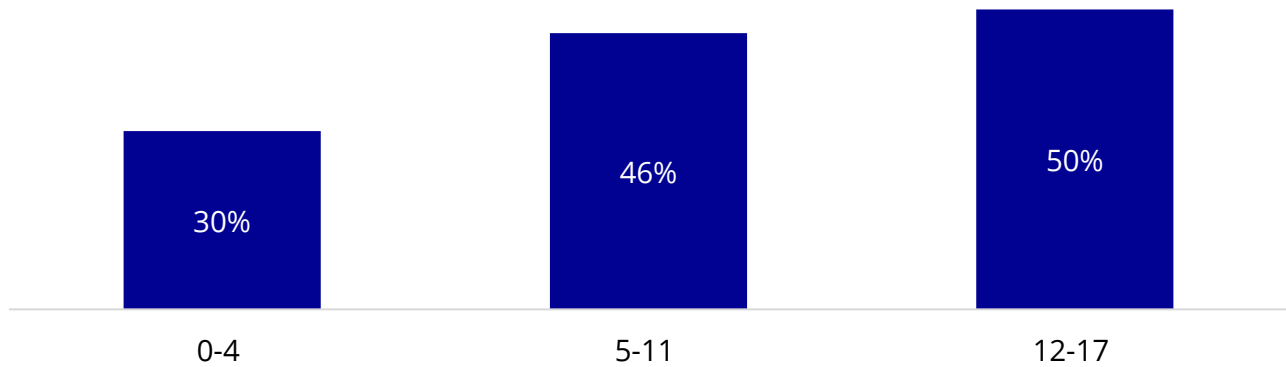
Around one-quarter (26%) of respondents live with children under the age of 18, and half (50%) of those who do, live with children aged 12–17 (Figure 23 & 24).

Figure 23: Do you live with children under the age of 18? N=617





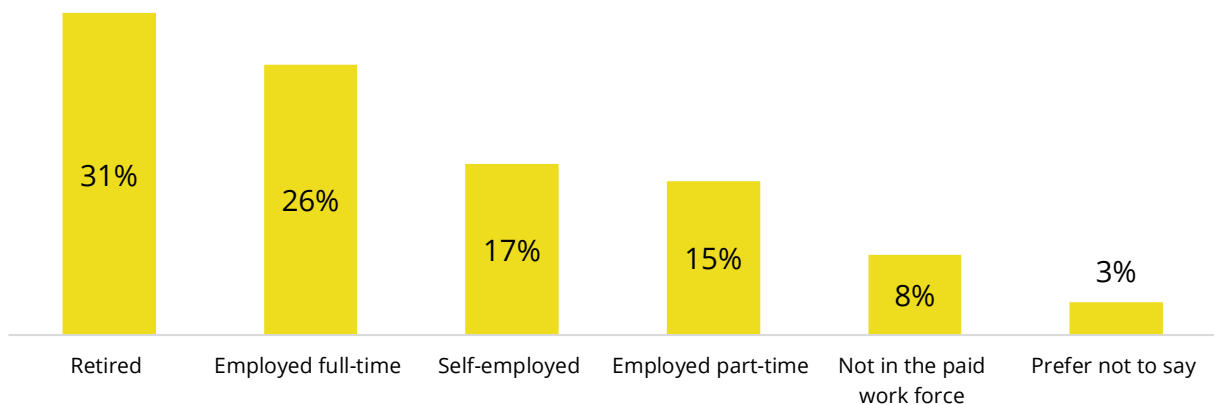
Figure 24: What are the ages of the children you live with? N=147



1 in 3 (31%) are retired — 1 in 4 (26%) are employed full-time

Among survey respondents, one-third said they are retired from the workforce and 1 in 4 (26%) are employed full-time. Smaller proportions are self-employed (17%), employed part-time (15%) or not in the paid work force (8%) (Figure 25).

Figure 25: What is your employment status? N=624

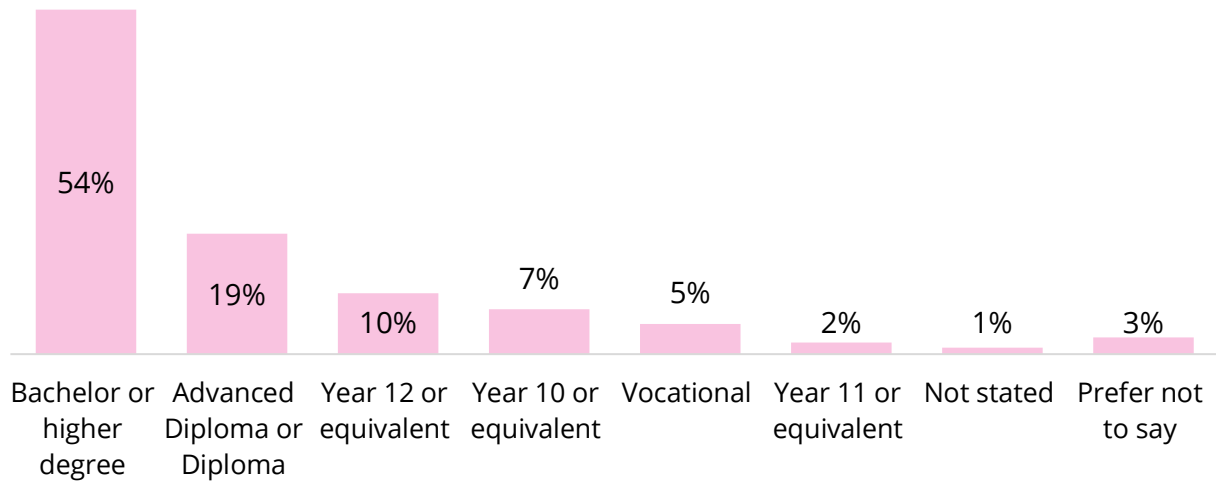


The survey sample is relatively highly educated

Respondents to the survey are highly educated, and more than half (54%) have a Bachelor or higher degree. Around one-fifth (19%) have an advanced diploma or diploma and 10% have completed year 12 or equivalent (Figure 26).



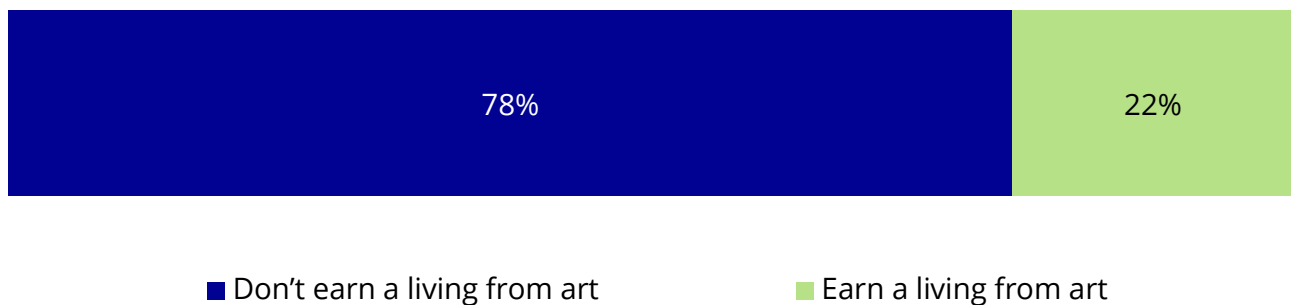
Figure 26: What is the highest level of education you've completed? N=612



1 in 5 earn a portion of their living from performing, teaching, or creating art themselves

Respondents were asked whether they earn any portion of their living from performing, teaching, or creating art of any kind. Around 1 in 5 (22%) said they earn a living from art, and 78% say they don't (Figure 27).

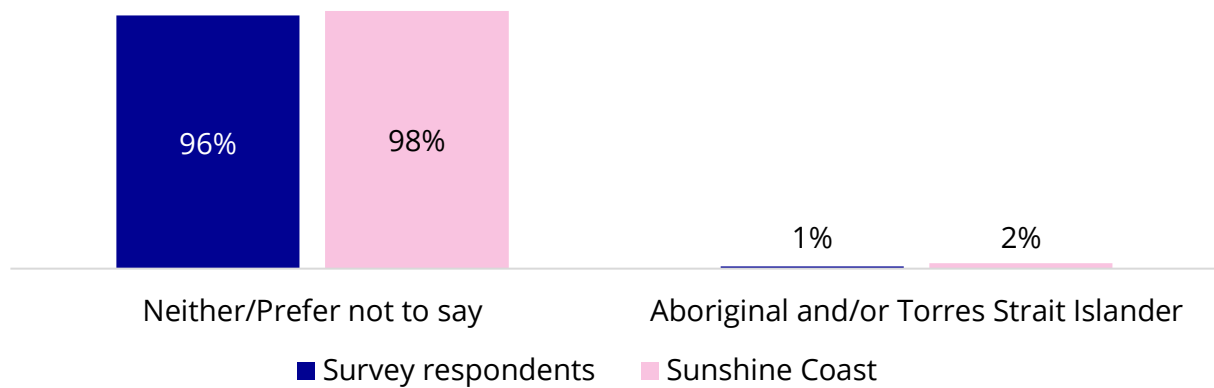
Figure 27: Do you earn a portion of your income from performing, teaching, or creating art of any kind? N=590



1% of survey respondents identify as Indigenous

Among survey respondents, just 1% identify as Aboriginal and/or Torres Strait Islander, which is slightly lower than the proportion of people who identify this way on the Sunshine Coast in general (Figure 28)²

Figure 28: Do you identify as Aboriginal and/or Torres Strait Islander? N=620

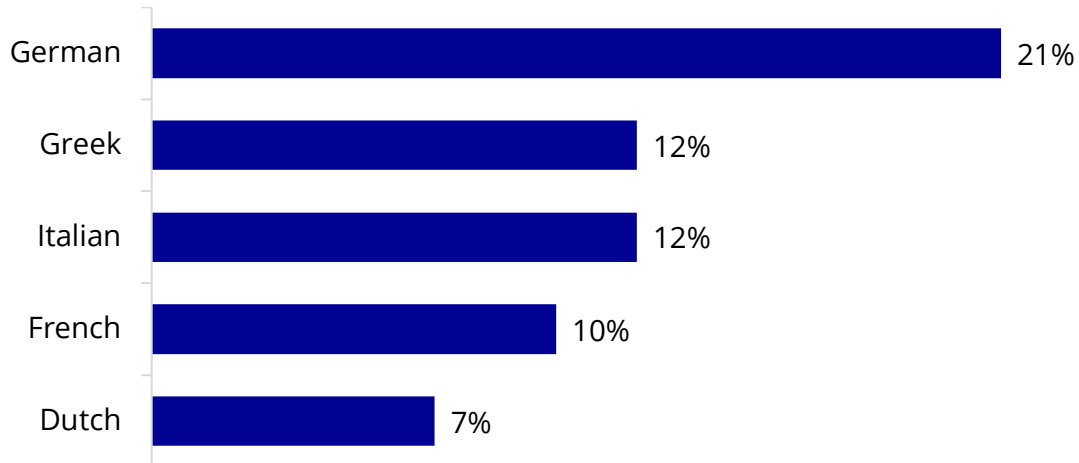


Some audiences speak a European language at home - German is the most common language spoken after English

Respondents were asked whether they speak a language other than English at home, and 7% said they did. This group was then asked to state which language they spoke, and the most common language mentioned was German (21%), followed by Greek (12%), Italian (12%), French (10%) and Dutch (7%) (Figure 29).

² Australian Bureau of Statistics (2020). *2016 Census Quickstats*. [online] Available at: https://quickstats.censusdata.abs.gov.au/census_services/getproduct/census/2016/quickstat/LGA36720 [accessed 30 October 2020].

Figure 29: Do you speak a language other than English at home? (Yes – please specify)
N=42



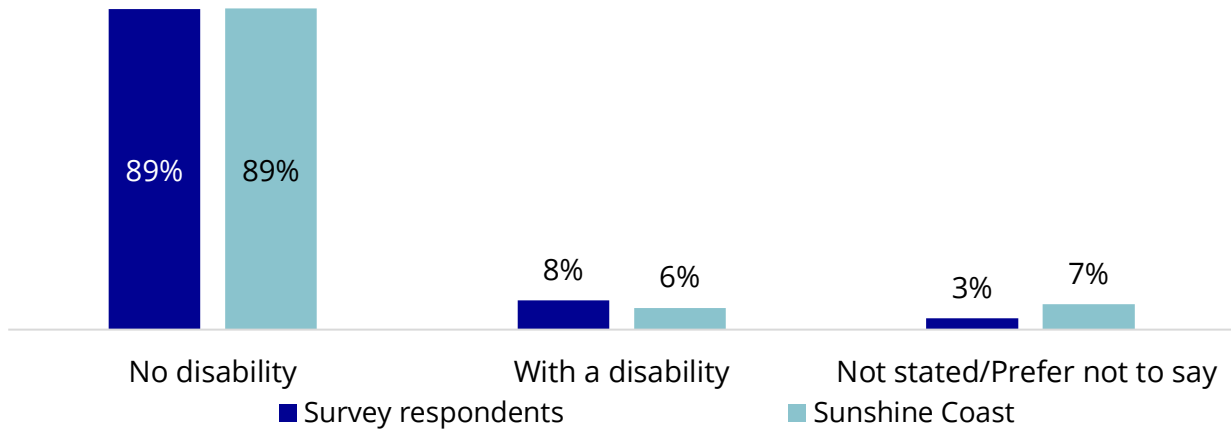
Around 1 in 10 (8%) have a disability, on par with the Sunshine Coast population

Slightly fewer than 10% of survey respondents said that they have a disability, compared to 6% of the Sunshine Coast population in general (Figure 30).³

³ id.community (2020). *Sunshine Coast: Need for assistance*. [online] Available at: <https://profile.id.com.au/sunshine-coast/assistance> [accessed 30 October 2020].



Figure 30: Do you identify as a person with disability and/or do you experience barriers which limit the activities you participate in or attend unless access and/or support is provided? N=616



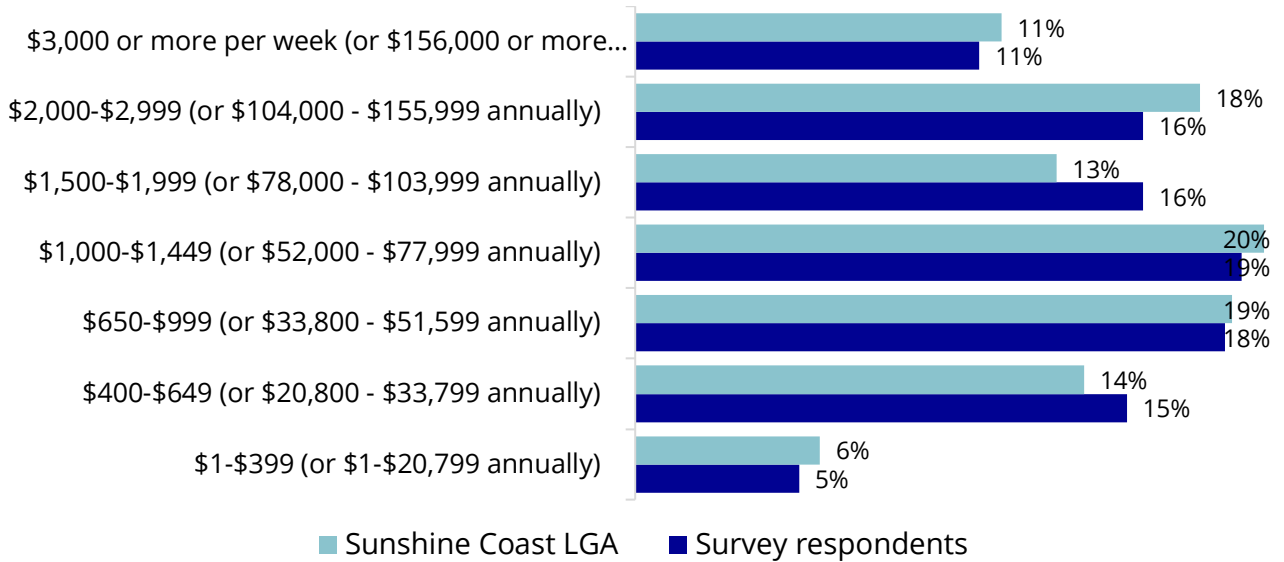
Survey respondents are slightly more affluent than the general Sunshine Coast population

Household income among survey respondents is generally consistent with the Sunshine Coast population, however with 42% earning more than \$1,500 per week in 2018/19 (Figure 31).⁴

⁴ id.community (2020). *Sunshine Coast: Household Income*. [online] Available at: <https://profile.id.com.au/sunshine-coast/household-income?WebID=10> [accessed 30 October 2020].



Figure 31: What was your weekly household income in the 2018/19 year [AUD]? N=601





About Patternmakers

Patternmakers is a research agency specialising in culture, creativity and community. We believe in the power of insight to help the arts flourish in Australia.

For any questions, please contact Tandi Palmer Williams, Managing Director on tandi@thepatternmakers.com.au.

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Cover image: Horizon Festival 2019, Ben Vos Productions